

Last Updated: 11/13/2020

MO ACTS Release Notes

NEW SYSTEM FUNCTIONALITY
VOLUME 2 - RELEASE 4.0, 5.0 & 6.0



Missouri's Advanced Contact Tracing System

Release Notes

Missouri's Contact Tracing Platform

This document includes important information about new MO ACTS functionality and system enhancements from each build release. Use this guide to understand the step by step processes about adjustments, improvements and changes within the MO ACTS platform.

Section (click for details)	Description	As of Date / System Release
MO ACTS In App Prompts	In App Prompts will direct users through a URL link to the latest Release Notes document on the MO ACTS Intranet Site and other important announcements for MO ACTS users.	11/16/20 Version 6.0
MO ACTS Submitting a Guided script for Multiple Household Members	In this section you will learn about how Contact Tracers can complete a guided call script for multiple contacts in a household when conducting outreach calls.	11/16/20 Version 6.0
MO ACTS English and Spanish Prerecorded Voicemail	Contact Tracers can now leave a contact a pre-recorded voicemail in either English or Spanish.	11/16/20 Version 6.0
MO ACTS Quarantine Period Length	There is a new field for total Number of Quarantine Days that is editable and will dynamically impact the Quarantine End Date field.	11/16/20 Version 6.0
MO ACTS New County Field on the Case and Account records	MO ACTS users can now find the County field on both the Contact Details and the Person Record. These fields will sync between the account/contact record and the case record.	11/16/20 Version 6.0
MO ACTS Automatic Case Monitoring	In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts in order to efficiently track their symptoms if/as they arise for themselves and/or household contacts.	11/16/20 Version 6.0
MO ACTS Inbound Call Routing and Voicemail	In this section you will learn about the updates to inbound call routing and the new ability for contacts to leave voicemails when calling MO ACTS.	11/16/20 Version 6.0
MO ACTS Amazon Connect Reporting	Contact Tracers can now view reporting metrics from the Amazon Connect Softphone. This includes reports such as average handle time for contacts, abandon rates, agent performance, and more.	11/16/20 Version 6.0
MO ACTS Custom Dashboards	In addition to the pre-built dashboard functionality within MO ACTS, Contact Tracers can now create their own personal dashboards so they can work with the selected reports side-by-side using them as components on a single page layout.	11/16/20 Version 6.0



<u>MO ACTS Household Management</u>	In this section we will show you how to view if a contact is part of a household (e.g. resides in the same living space with other contacts) and view additional details that can help inform your contact tracing activities.	10/26/20 Version 5.0
<u>MO ACTS System UI Enhancements</u>	Learn about various User Interface (UI) enhancements, including enhancements to picklists, and a new field for Unit Number.	10/26/20 Version 5.0
<i>MO ACTS Automatic Case Monitoring</i>	<i>Functionality has been updated in the newest release.</i>	<i>10/26/20 Version 5.0</i>
<u>MO ACTS Resource Coordination</u>	In this section you will learn about new functionality around resource coordination in MO ACTS. How to assign a resource coordinator, how to view all contacts requiring resource coordination, and how to view cases assigned to you.	10/26/20 Version 5.0
<u>MO ACTS Amazon Connect Updates</u>	In this section you will learn about additional features and functionality that have been added to the Amazon Connect phone system within MO ACTS.	10/26/20 Version 5.0
<i>MO ACTS Inbound Call Routing and Voicemail</i>	<i>Functionality has been updated in the newest release.</i>	<i>10/26/20 Version 5.0</i>
<u>MO ACTS Jurisdiction Ad Hoc Access</u>	In this section, you will learn about how contact tracers are now able to be added to multiple jurisdiction groups and have the ability to see case records for each group.	10/05/20 Version 4.0
<u>MO ACTS Bulk Contact Case Actions</u>	Learn how to close cases and how to reassign ownership of cases in bulk.	10/05/20 Version 4.0
<u>MO ACTS Case, Contact, and Account Page Layouts</u>	Learn about how these pages are updated for clarity and are more intuitive to read.	10/05/20 Version 4.0
<u>MO ACTS Route to Queue Based on EpiTrax Investigation Agency</u>	In this section you will learn how in the absence of a county listed in EpiTrax, cases will be routed to an LPHA queue through the EpiTrax Investigation Agency.	10/05/20 Version 4.0
<u>MO ACTS Additional EpiTrax Attributes</u>	Learn about new attributes listed to be used by Case Investigators within EpiTrax.	10/05/20 Version 4.0

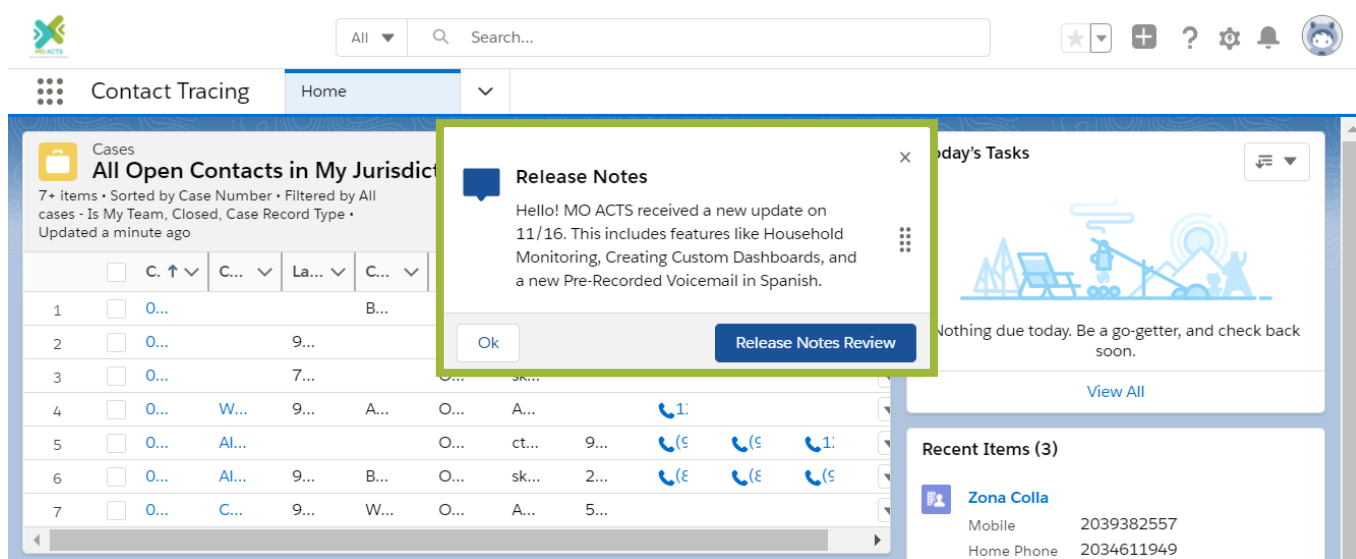


<u>MO ACTS Reporting: Export Data</u>	In this section you will learn about the ability to export data through the reporting functionality within MO ACTS.	10/05/20 Version 4.0
MO ACTS Multiple Exposures for One Contact <i>See Vol.1 of Release Notes</i>	Learn about how MO ACTS will now show if a Contact to a COVID-19 case has had multiple exposures.	9/11/20 Version 3.0
MO ACTS System UI Enhancements <i>See Vol.1 of Release Notes</i>	Learn about various User Interface (UI) enhancements, including: additions to List Views, a new editable County field, enhancements to picklists, and a new Provider Name field.	9/11/20 Version 3.0
MO ACTS Surge Resource Enhancements <i>See Vol.1 of Release Notes</i>	Learn about case visibility when case ownership is transferred to a surge resource in your jurisdiction.	9/11/20 Version 3.0
MO ACTS Auto Task Logging for Calls Functionality <i>See Vol.1 of Release Notes</i>	In this section, you will learn how the process for logging calls has been updated to occur automatically during the Contact Outreach Process.	9/11/20 Version 3.0
MO ACTS Reporting Functionality <i>See Vol.1 of Release Notes</i>	Learn about the various reports that Business Admins and Supervisors are able to utilize to track usage of the MO ACTS System, the time it took for a contact tracing case to move to monitoring and support, and the ability to export reports and import data through the View/Configure Setup Menu Export Reports permission.	9/11/20 Version 3.0
MO ACTS Email Functionality <i>See Vol.1 of Release Notes</i>	Follow these steps the first time you send an Email through MO ACTS to set up a template.	8/20/2020 Version 1.1
MO ACTS Change County or Jurisdiction Functionality <i>See Vol.1 of Release Notes</i>	In this section you will learn how to update a Contact to a COVID-19 Case's county in the Personal Details screen of the Guided Script as well as how to change the Case's jurisdiction – Including important considerations related to this change.	8/20/2020 Version 1.1



MO ACTS In App Prompts

MO ACTS will now feature In App Prompts that will direct users through a URL link to the latest Release Notes document on the MO ACTS Intranet Site providing important information on the system enhancements. The prompts will appear the day after deployment occurs until the Thursday of the release week. If a user dismisses the notification, it will reappear after two days, giving them another opportunity to be directed to the Release Notes. This notification will appear, and will similarly need to be dismissed, on both the Home and Case tabs so that users will see the notification no matter what screen you were last viewing.



MO ACTS Submitting a Guided Script for Multiple Household Members

MO ACTS now has new functionality within the Guided Script for a Contact Tracer to complete the script for multiple contacts in a household when conducting outreach calls. Follow the steps below to learn how to process these contacts.

Processing Guided Scripts for Household Members

1. When a contact tracer is conducting an outreach call and reaches the end of the guided script, they will be asked if they would like to conduct contact tracing for another member of the household. The prompt will state the contacts name and contact type. This prompt occurs only when there are more cases in Awaiting Outreach in the household. Select yes and then click next.

00012684 Guided S...

Guided Script - Contact Tracing

Would you like to do contact tracing for Kayla A P (HOUSEHOLD)?

You must select one:

☒ Yes

☐ No

Previous Next

2. The next screen will be the beginning of the new guided script for the household contact. Progress through the script as you would typically. Once complete, the contact tracer will continue to be prompted with beginning a new script for household contacts until each person in the household has been addressed.

Introduction

Hello, is this Kayla A P?

If no, ask to speak to that person.

My name is and I am calling from the Missouri Department of Health and Senior Services.

I was calling today to let you know that you have been exposed to coronavirus (COVID-19).

* Do you have time to discuss what this might mean for you?

☒ Yes

☐ No

Previous Next

- Once every contact has been addressed, you will see a screen stating that there are no more cases needing contact tracing in the household. Click Finish.

00012684 Guided S... ▾ ×

Guided Script - Contact Tracing

There are no more cases that need contact tracing in the household.

Finish

- Once you hang up the call, an automated Task Log will appear. Fill in the details (date, call intention, etc.) and complete it as usual.

NOTE: Keep in mind that only one call log task is logged to the and it is related to the last modified case. Guidance is to manually log the call for each member of the household.

Completing Contact Tracing for Contacts with Multiple Exposures

- If there is a person who has been exposed to multiple positive patient cases and the outreach has not been started yet for more than one of the exposures, you will see this screen notifying you that there are additional records awaiting outreach for that person.

00012684 Guided S... ▾ ×

Guided Script - Contact Tracing

Additional contact cases in awaiting outreach exist for this person. You will need to do contact tracing for the other case(s). Clicking next will check if there are any household members. If there are no household members the call script will close and you can do the call script for the additional cases for this contact.

[Previous](#) [Next](#)

- Lastly, it's important to note that for contacts with multiple contact cases, contact tracers will need to process the rest of the cases associated with the contact individually. This occurs when a contact has been exposed multiple times, for example. The cases are viewable under the Person Account under the Cases section.

MO ACTS

All ▾ Search...

Contact Tracing Home ▾ 00012684 ▾ × Kayla A P ▾ ×

Cases (3) [New](#)

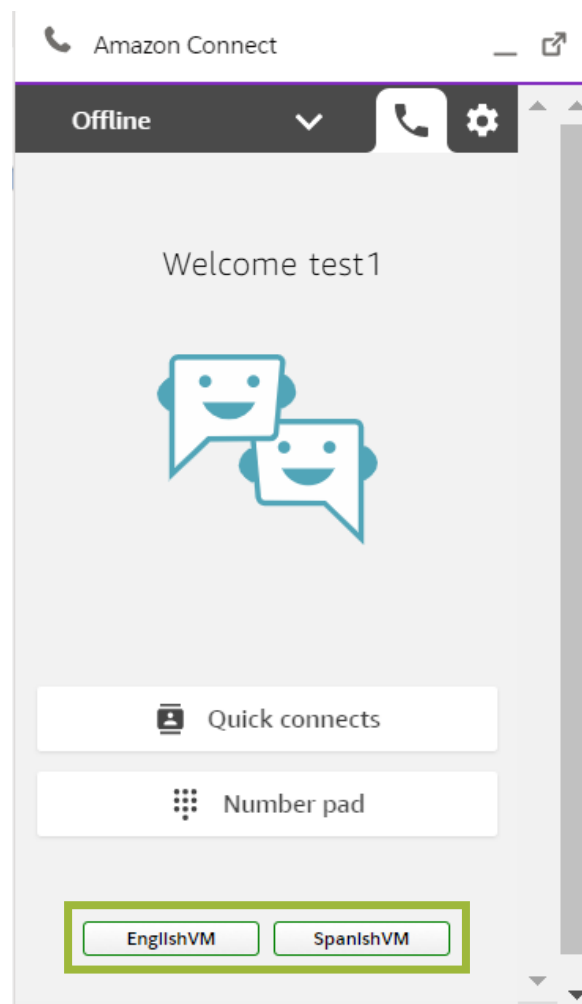
Case	Contact Name	Date Opened	Status
00012689	Kayla A P	10/20/2020, 12:42 PM	Awaiting Outreach ▾
00012687	Kayla A P	10/20/2020, 9:07 AM	Awaiting Outreach ▾
00012686	Kayla A P	10/20/2020, 9:06 AM	Awaiting Outreach ▾

[View All](#)

MO ACTS English and Spanish Pre-recorded Voicemail

During the contact outreach process, contact tracers can leave a pre-recorded voicemail for the Contact to COVID-19 case if they do not answer. The Amazon Connect Softphone features a new “Transfer to Voicemail” button, as shown below. When you reach the contact’s voicemail, click this button to leave the pre-recorded voicemail. The automated Voicemail message is in both English and Spanish.

The complete voicemail message is as follows: Hello, I am calling from Department of Health for State of Missouri working with the Contact Tracing Collaborative. We are following up with you and will call you back soon. You are also welcome to call us back on 573-751-1656.



MO ACTS Quarantine Period Length

In MO ACTS there is now a new field for the total **Number of Quarantine Days**, found on the Case Details pane under the Case Information Section. This field is editable and will dynamically impact the **Quarantine End Date** field with the appropriate date based on the length of the Contact to a COVID-19 Case's quarantine period. Both the Number of Quarantine Days field and the Last Exposure Date field will impact the Quarantine End Date for the contact. Keep in mind that the Quarantine End Date field is not editable.

Case

[+ Follow](#) [Change Owner](#) [Edit](#) [Printable View](#)

Status
Awaiting Outreach

Case Record Type
Contact Outreach

Case Owner
 Sharon Strong

Details

Other Actions

Case Information

Contact Type		Is Healthcare Worker?	
Subject		Date of Death	
Date/Time Opened	7/24/2020, 2:00 PM	County	BOONE
Outreach Underway Date		Investigating Agency	
Outreach Outcome		Is My Team	<input checked="" type="checkbox"/>
Status	Awaiting Outreach	Provided Quarantine Instructions	<input checked="" type="checkbox"/>
Last Exposure Date	9/28/2020	Interview Completed Date	
Quarantine End Date	10/12/2020	Closed Reason	
Number of Quarantine Days	14	Date/Time Closed	
Speaking with Household Member	<input type="checkbox"/>	Closed Reason: If Other, Please Specify	
Employer Letter Requested?	<input type="checkbox"/>		

MO ACTS County Field on the Case and Account Records

MO ACTS users can now find the County field on both the Contact Details and the Person Record. These fields will sync between the account/contact record and the case record. The county field will be a dropdown that you can edit.

NOTE: When you change the county, be aware that permissions for this case will change as well, preventing you from accessing this record after saving if you are not a member of the updated jurisdiction. The case will also disappear from the current queue once it is closed (e.g. once the call ends). If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, the case will be directed to the Administration queue.

The screenshot displays the MO ACTS Case Record interface. On the left, the 'Contact Details' section for 'Zona Colla' is visible, including contact information and a highlighted 'County' dropdown set to 'BOONE'. The main panel shows the 'Case Information' section with various fields. The 'County' field is highlighted with a green box, showing a dropdown menu with a list of Missouri counties, including BOONE, ADAMS, ADMINISTRATION, ANDREW, ATCHISON, AUDRAIN, BARRY, BARTON, BATES, BENTON, BOLLINGER, and BOONE.

Users can also find the county field on the Person Account Record:

The screenshot displays the MO ACTS Person Account Record interface for 'Zona Colla'. The 'Details' section is visible, showing account information and a highlighted 'County' dropdown set to 'BOONE'. The dropdown menu is open, showing a list of Missouri counties, including BOONE, ADAMS, ADMINISTRATION, ANDREW, ATCHISON, AUDRAIN, BARRY, BARTON, BATES, BENTON, BOLLINGER, and BOONE.

MO ACTS Automatic Case Monitoring: SMS Messages Functionality

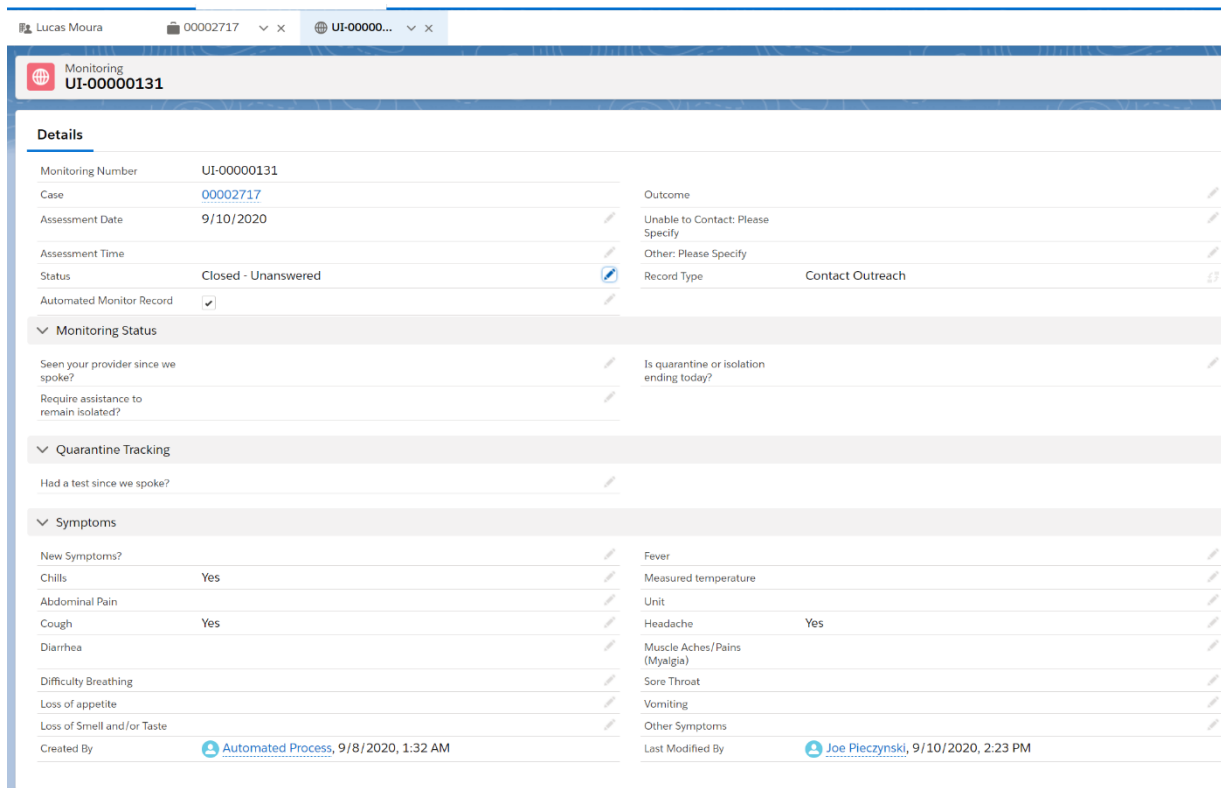
In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts during their quarantine duration in order to efficiently track their symptoms if/as they arise as well as the symptoms of members in their household.

MO ACTS will automatically generate SMS messages to actively monitor contacts by linking to a form to collect symptoms every day for the duration of quarantine (14 days since the last exposure date). This will occur as long as the case meets the following criteria, which is used when the contact validates their identify when self-logging symptoms:

1. The **phone number field** on the case record is populated
2. The **email field** on the case record is populated
3. The **birth date** field on the case record is populated

The data entered by the Contact each day will generate a monitor record in MO ACTS as depicted below which the Contact Tracer can view in the Contact Outreach Case record.

NOTE: If when speaking to the Contact they are aware of and provide a new date of last exposure, the contact tracer can manually update this field in Salesforce **and** EpiTrax individually. The monitoring would then continue 14 days past the most recently populated Last Exposure Date.



Monitoring UI-00000131	
Details	
Monitoring Number	UI-00000131
Case	00002717
Assessment Date	9/10/2020
Assessment Time	
Status	Closed - Unanswered
Automated Monitor Record	<input checked="" type="checkbox"/>
Outcome	Unable to Contact: Please Specify
Other: Please Specify	
Record Type	Contact Outreach
Monitoring Status	
Seen your provider since we spoke?	
Require assistance to remain isolated?	
Is quarantine or isolation ending today?	
Quarantine Tracking	
Had a test since we spoke?	
Symptoms	
New Symptoms?	
Chills	Yes
Abdominal Pain	
Cough	Yes
Diarrhea	
Difficulty Breathing	
Loss of appetite	
Loss of Smell and/or Taste	
Fever	
Measured temperature	
Unit	
Headache	Yes
Muscle Aches/Pains (Myalgia)	
Sore Throat	
Vomiting	
Other Symptoms	
Created By	Automated Process, 9/8/2020, 1:32 AM
Last Modified By	Joe Pieczynski, 9/10/2020, 2:23 PM

NOTE:

The MO ACTS system will attempt to send a message if there are one or more phone number(s) pre-populated to the case record, even if the phone is a landline. At this time, we cannot track if a message was received, however, **we recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms.** If not, the contact tracer



can bypass auto case monitoring for the contact by either the checkbox in the **guided script** at the end of the symptoms section, or by using the checkbox within the **Case Details** under the Symptoms section. The contact tracer will then follow the standard case monitoring procedures in place.

Guided Script – Symptoms Section:

Have you had shortness of breath?
Select an Option ▼

Have you had difficulty breathing?
Select an Option ▼

Have you had chest pain?
Select an Option ▼

Any nausea or vomiting?
Select an Option ▼

Any abdominal pain?
Select an Option ▼

Have you had diarrhea (>= loose stools/24hr period)?
Select an Option ▼

Are you still having symptoms? *If no indicate when symptoms stopped.*

Symptoms Start Date
[Date Picker]

Symptoms Stop Date
[Date Picker]

If you provide your date of birth and email address you will be signed up for automated symptom monitoring. This helps us keep track of how you are feeling. Would you like to opt-out of this service?

☐ Opt Out of Symptom Monitoring

Previous Next

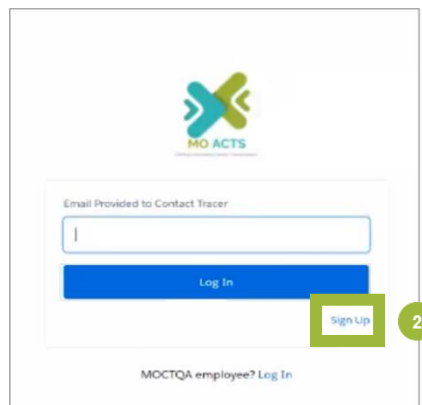
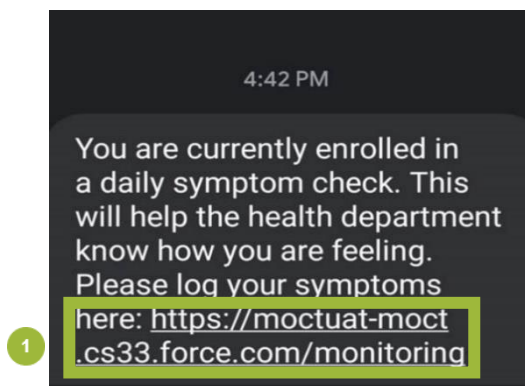
Case Details – Symptoms Section Manual Bypass:


▼ Symptoms			
Symptom Onset Date		Headache	Yes
Symptom Resolution Date		Fatigue	Yes
Fever	Yes	Cough	Yes
Fever Temperature		Wheezing	Yes
Feverish	Yes	Shortness of Breath	Yes
Chills	Yes	Difficulty Breathing ⓘ	Yes
Rigors	Yes	Chest Pain	
Muscle Aches & Pains ⓘ	Yes	Vomiting	Yes
Runny Nose	Yes	Abdominal Pain	Yes
Sore Throat	Yes	Diarrhea	Yes
Loss of Smell and/or Taste		Other Symptoms	
		Automated Monitoring Bypass	<input type="checkbox"/>

For awareness, this is what the Contact to a COVID-19 Case will see and the steps they will take once they receive the text to provide and track their symptoms, starting with signing in for the first time.

1. The contact will receive the SMS message at **9 AM CST** every day during the quarantine period.
2. The contact will click the link, and then will need to select **Sign Up** for their first-time logging in. If not, they will receive an error message.
3. Once signed up and authenticated, they will enter their information (**First Name**, **Last Name**, and **Birthdate**) as was given to the contact tracer and select **Next**.
4. Then, they will be able to track their symptoms which will then be collected in the monitor record automatically.
5. Additionally, for a contact in a household, they can continue to fill out symptom and monitoring information for the rest of the members of the household through the same process once they have submitted their own information and have returned to the screen with First Name, Last Name, and birthdate.

NOTE: If a member of a household is not a contact in MO ACTS, their monitoring information cannot be submitted. Additionally, once any household member fills out symptoms for a specific person, all of the active monitoring records for that person are disabled so no other person in the household can go in and resubmit symptoms for that person that day.





0260.079@mactmonitoring.com [Log Out](#)

Please enter the following data as given to the contact tracer:


3

* First Name ¹

* Last Name ¹

* Birthdate ¹

Next



0260.079@mactmonitoring.com [Log Out](#)

Lucas, in the last 24 hours have you experienced any of the following symptoms:

4

Sore Throat ☐ No

Headache ☐ No

Vomiting ☐ No

Loss of Appetite ☐ No

Diarhea ☐ No

Fever ☐ No

Cough ☐ No

Chills ☐ No

MO ACTS Inbound Call Routing and Voicemail

In addition to Contacts to a COVID-19 case being able to call back through the MO ACTS number and Contact Tracers receiving these inbound calls, Contacts can now leave voicemails if their call is unanswered. A voicemail will trigger the creation of a missed call task and a notification will be sent to the assigned Contact Tracer. In this section you will learn how the voicemail functionality works in a few key scenarios and how it affects the routing logic for receiving inbound calls.

The Contact to a COVID-19 Case will be calling the existing AWS number for both inbound calling and for SMS call backs (573-751-1656).

When a Contact to a COVID-19 Case calls, the call will follow routing logic based first on the case being associated to a phone number or next through the associated jurisdiction/county. Resulting from this, a missed call task will be created automatically. There are three potential scenarios:

Scenario A - Phone Number is Associated to a Case and Assigned to a Contact

Tracer: The call will route to the Contact Tracer assigned to the Contact to COVID-19 case and if they are unavailable, a missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.

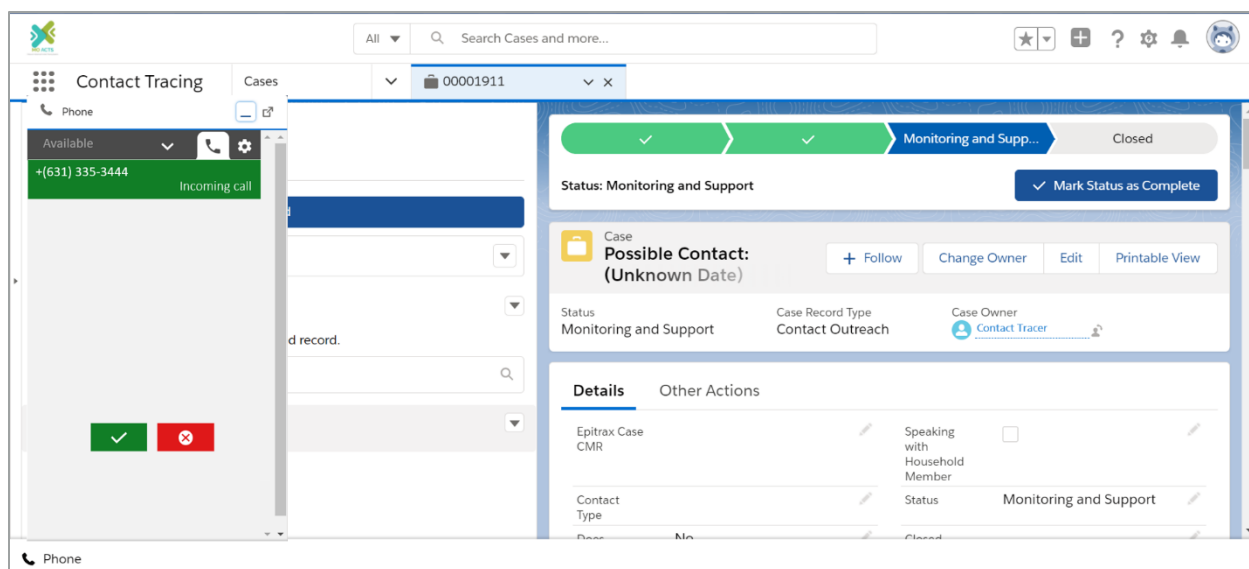
If the Contact Tracer's Amazon Connect status is set to Available but they do not answer the call, the caller will be on hold for two minutes and then will be prompted to leave a voicemail. A missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.

Scenario B - Phone Number is Associated with a Jurisdiction: The call will route to the associated LPHA queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the LPHA queue is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section.

Scenario C - Phone Number has No Associated Jurisdiction (Unknown Caller): The Call will route to their associated LPHA queue after a series of prompts or the Administration queue. Once routed, the contact will hear hold music for 30 seconds and if no Contact Tracer within the Administration queue (DHSS) is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and append to that case. A missed call notification will not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section. See below for more information on Unknown Call Routing.

Upon the contact tracer receiving an inbound call, the Contact Tracer's Amazon Connect softphone will automatically pop-up and show a screen similar to the one below if their status is set to available.





NOTE:

- The phone number of the Contact to a COVID-19 Case of the incoming call will be displayed on top of the Amazon Connect screen.
- You will also find buttons to **Accept** or **Decline** the incoming call.

Unknown Call Routing

In this section you will learn how a call is routed when a contact calls in to MO ACTS using a phone number not associated with their case. This can happen when that contact calls from a new or borrowed phone number.

When the contact calls in, they will be prompted to state their county. If the caller's speech is understood by the system bot, they can confirm the county name by pressing 1 to be transferred over. If the caller's speech is not understood, the caller can either press 3 to enter their five-digit zip code on the number pad or will be prompted to speak up to two more times before they must enter their zip code. This process ensures that the caller will be directed to the correct jurisdiction.

NOTE: If users say the wrong county or enter the wrong zip code, they will be routed to the zip code they enter regardless. If users enter an invalid zip code, they will be routed to the Admin Queue.

Receiving a Missed Call from Contacts who Share a Phone

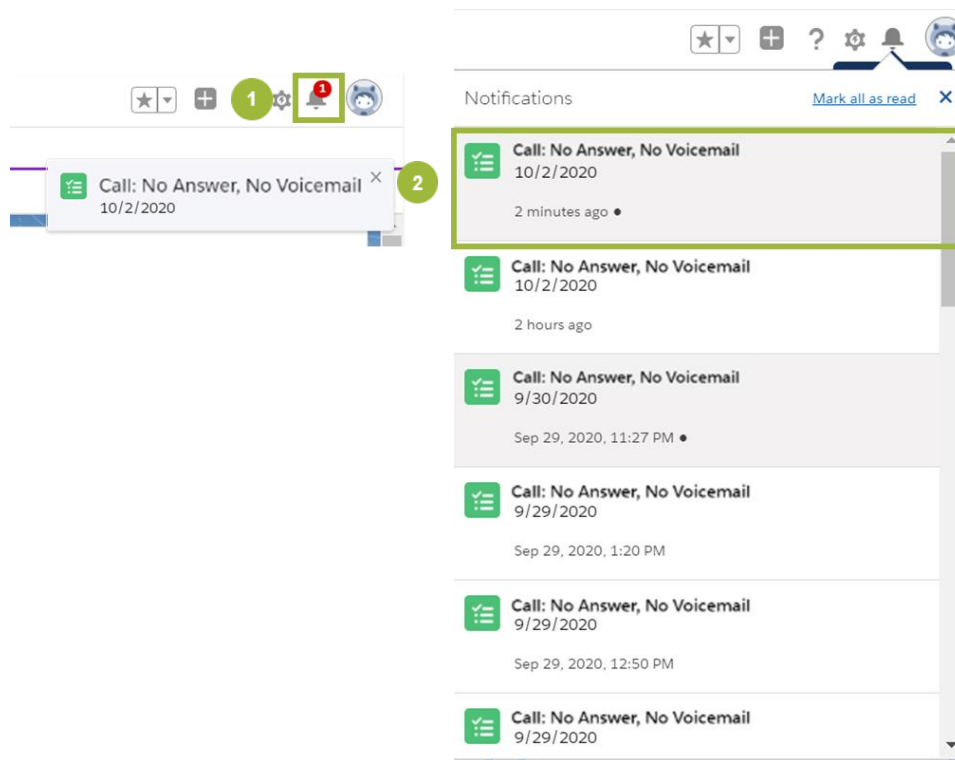
If a contact is calling using a phone that they share with another contact and their call goes unanswered, a missed call task along with a voicemail will be created and appended to the case that was last updated.

NOTE: Keep in mind that any time a contact tracer calls someone back, it is best practice to validate who you are speaking with first.

Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

Below are the steps recognizing when you have missed a call and how to access the missed call task and associated voicemail.

1. From any screen in MO ACTS, a Contact Tracer will be able to see that they have a missed call notification through the **Notification Bell** at the top right of the MO ACTS screen. You can also check the **Today's Tasks** section from the **Home Screen**.
2. When you click the bell, a drop down will appear, showing you that you have a missed call. Click the notification.



NOTE: Missed call notifications will not accurately reflect whether or not a caller left a voicemail. Always click into the notification or view the tasks queue to determine if a voicemail has been appended to the case.

3. Click on the **notification**. From here, a new window will open showing you the **Details tab** of the missed call task. Next, click the **Related tab**. Here you will be able to see the caller's voicemail message if one was left.

3

Task: **Call: Inbound Call Received**

Follow Mark Complete Edit Comments Change Status Change Priority

Name: [fna1 mna1 lna1](#) Related To: [00001161](#)

Details Related Chatter

Phone Call

Call Direction	Inbound
Call Intention	
Call Outcome	
Due Date/Time	
Phone	+16785458420
Comments	

Related To

Related To	00001161	Name	fna1 mna1 lna1
------------	----------	------	----------------

Task Information

Subject	Call: Inbound Call Received	Due Date	10/2/2020
Assigned To	Vy Nguyen	Priority	Normal
Status	Open		

System Information

Created By	AWS Integration User, 10/2/2020, 11:42 AM	Last Modified By	AWS Integration User, 10/2/2020, 11:42 AM
------------	---	------------------	---

4. Click **Attachments** to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.

4

Task: **Call: Inbound Call Received**

Follow Mark Complete Edit Comments Change Status Change Priority

Name: [fna1 mna1 lna1](#) Related To: [00001161](#)

Details Related Chatter

Attachments (1)

File Name	Size	Last Modified
CallRecording.wav	45KB	10/2/2020, 11:51 AM

View All

Files (0)

Add Files

Upload Files

Or drop files

4

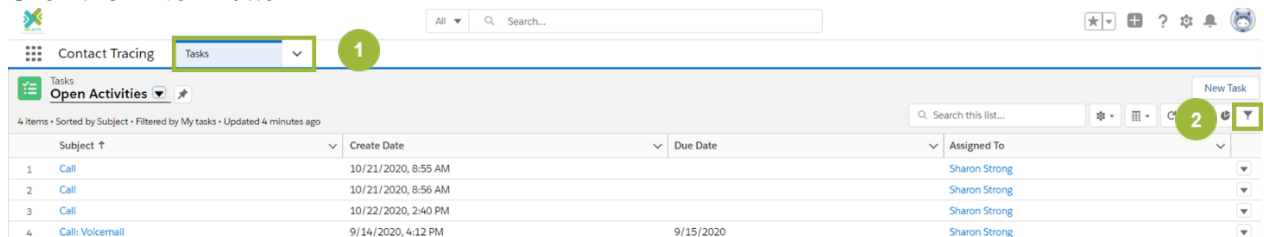


LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

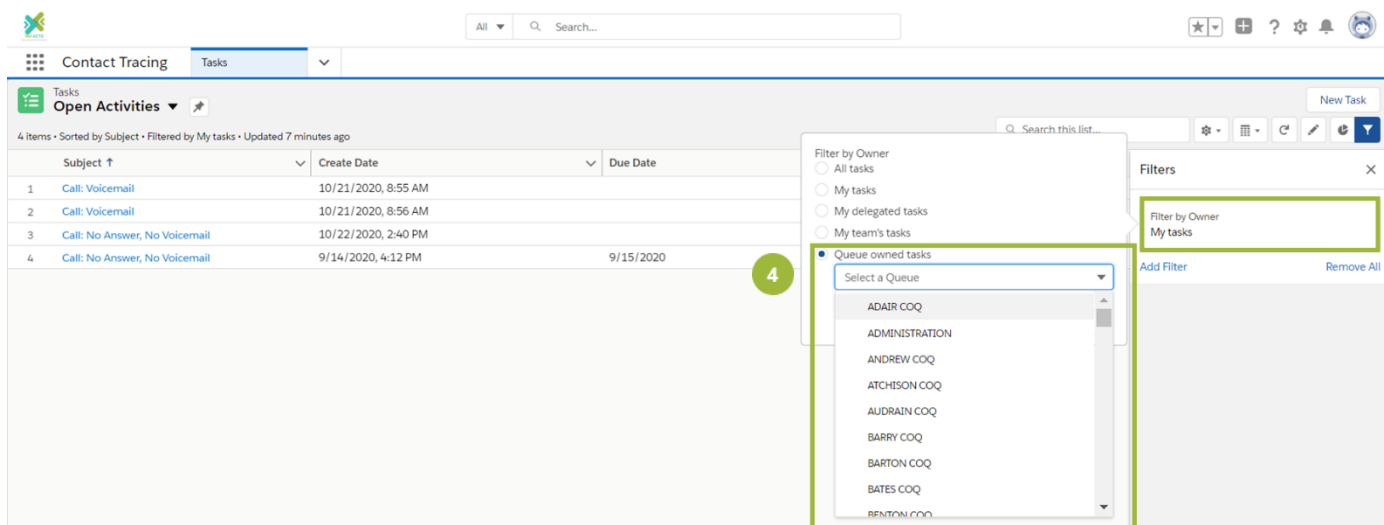
When a Contact to a COVID-19 case calls from a phone number that is not yet associated with a contact owned by a Contact Tracer, their call will be routed to the appropriate queue (jurisdiction or Admin). If the call goes unanswered, a missed call task will be created for the queue that can be found by viewing the tasks assigned to the respective queue. The missed call task can then be reassigned to a contact tracer to begin work on the contact case.

To view the missed call tasks for an LPHA or Admin Queue

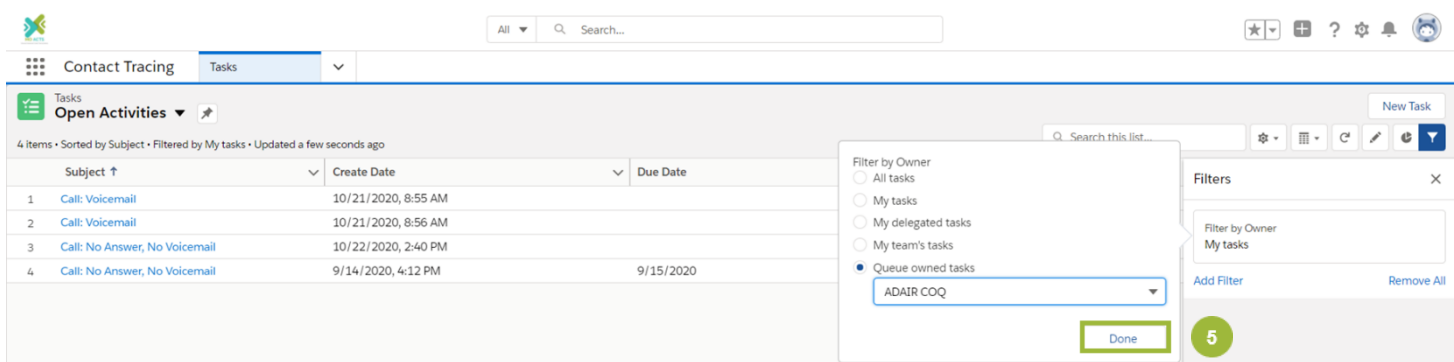
1. Navigate to the Tasks tab and use the drop down to open the Open Activities List View
2. Click the **Filter** Button



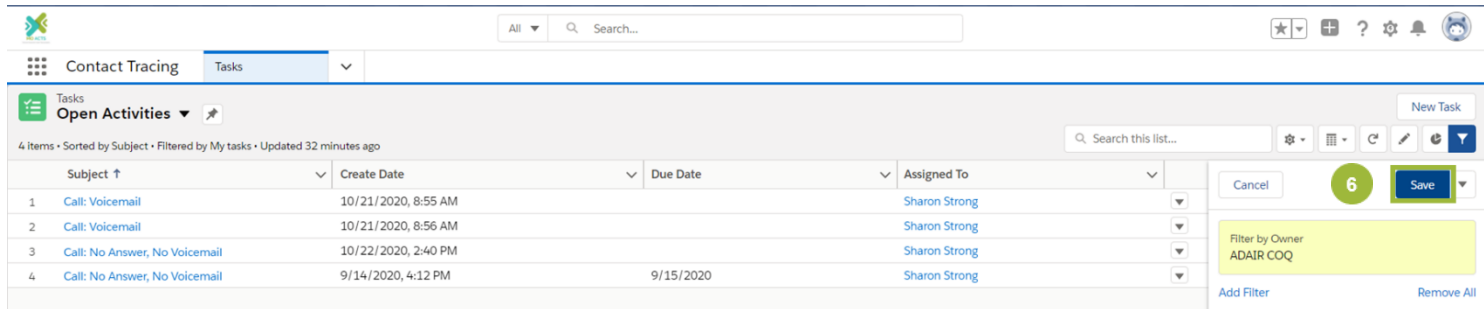
3. Click on **Filter By Owner**
4. Select **Queue Owned Tasks**, then select a Queue from the drop down



5. Click **Done**



6. Click **Save**



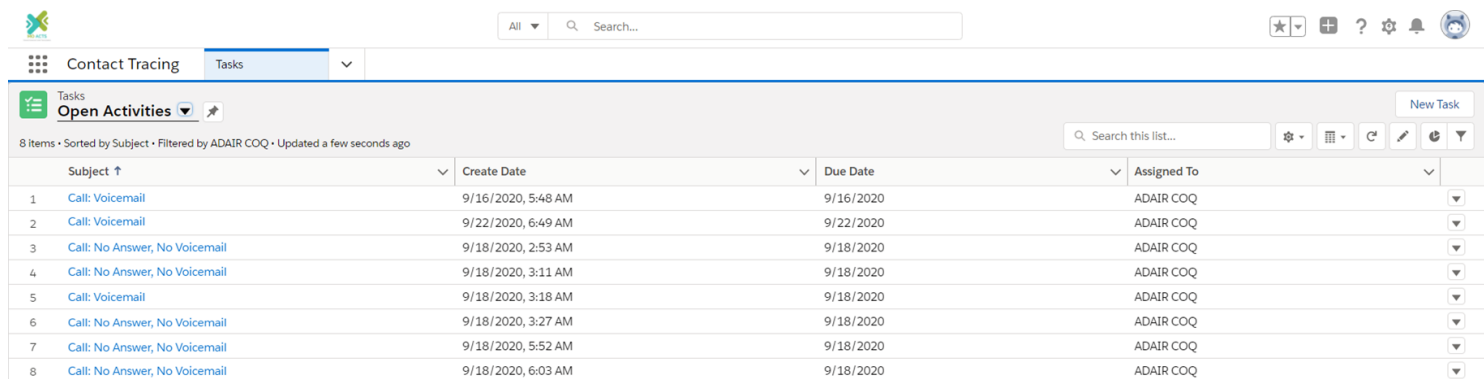
4 Items • Sorted by Subject • Filtered by My tasks • Updated 32 minutes ago

Subject ↑	Create Date	Due Date	Assigned To
1 Call: Voicemail	10/21/2020, 8:55 AM		Sharon Strong
2 Call: Voicemail	10/21/2020, 8:56 AM		Sharon Strong
3 Call: No Answer, No Voicemail	10/22/2020, 2:40 PM		Sharon Strong
4 Call: No Answer, No Voicemail	9/14/2020, 4:12 PM	9/15/2020	Sharon Strong

Filter by Owner: ADAIR COQ

Buttons: Cancel, 6, Save, Add Filter, Remove All

7. Your newly filtered list will display.

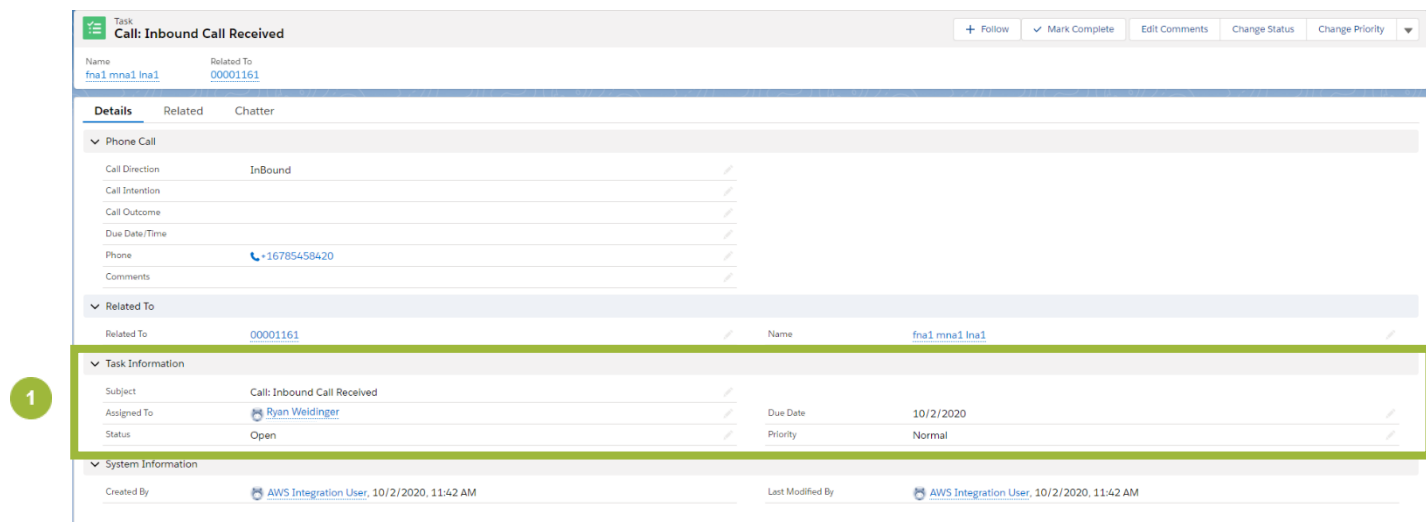


8 Items • Sorted by Subject • Filtered by ADAIR COQ • Updated a few seconds ago

Subject ↑	Create Date	Due Date	Assigned To
1 Call: Voicemail	9/16/2020, 5:48 AM	9/16/2020	ADAIR COQ
2 Call: Voicemail	9/22/2020, 6:49 AM	9/22/2020	ADAIR COQ
3 Call: No Answer, No Voicemail	9/18/2020, 2:53 AM	9/18/2020	ADAIR COQ
4 Call: No Answer, No Voicemail	9/18/2020, 3:11 AM	9/18/2020	ADAIR COQ
5 Call: Voicemail	9/18/2020, 3:18 AM	9/18/2020	ADAIR COQ
6 Call: No Answer, No Voicemail	9/18/2020, 3:27 AM	9/18/2020	ADAIR COQ
7 Call: No Answer, No Voicemail	9/18/2020, 5:52 AM	9/18/2020	ADAIR COQ
8 Call: No Answer, No Voicemail	9/18/2020, 6:03 AM	9/18/2020	ADAIR COQ

If reassigning the case to yourself or another Contact Tracer, please follow the steps below:

1. After you have opened the missed call notification through the **Notification Bell** icon, the missed call task will open, showing you the **Details tab**. To reassign a case to a contact tracer, locate the Task Information Section



Task: Inbound Call Received

Name: fna1 mna1 lna1 | Related To: 00001161

Buttons: + Follow, ✓ Mark Complete, Edit Comments, Change Status, Change Priority

Details	Related	Chatter
Phone Call		
Call Direction	InBound	
Call Intention		
Call Outcome		
Due Date/Time		
Phone	+16785458420	
Comments		
Related To		
Related To	00001161	Name: fna1 mna1 lna1
Task Information		
Subject	Call: Inbound Call Received	
Assigned To	Ryan Weldinger	Due Date: 10/2/2020
Status	Open	Priority: Normal
System Information		
Created By	AWS Integration User, 10/2/2020, 11:42 AM	
Last Modified By	AWS Integration User, 10/2/2020, 11:42 AM	

2. Click on the pencil icon to edit the **Assigned To** field and search the name of the contact tracer you want to assign the case to

The left screenshot shows the 'Task Information' section with a dropdown menu for the 'Assigned To' field. The dropdown is open, showing a list of people: Vy Nguyen, Sumi Goswami, Ryan Weidinger, Sowjanya Kamindia, and Sunny Joon. A green circle with the number '2' is next to the dropdown. The right screenshot shows the 'Task Information' section with the 'Assigned To' field set to 'Vy Nguyen'. A green circle with the number '2' is next to the field.

3. Click **Save**. The case will now be assigned to a Contact Tracer and they will receive a notification stating the Account Owner assigned a case to them.

The screenshot shows the 'Task Information' section with the following details:

- Subject:** Call: Inbound Call Received
- Assigned To:** Vy Nguyen
- Status:** Completed
- Due Date:** 10/2/2020
- Priority:** Normal

The 'System Information' section shows:

- Created By:** AWS Integration User, 10/2/2020, 11:42 AM
- Last Modified By:** AWS Integration User, 10/2/2020, 11:42 AM

At the bottom, there are 'Cancel' and 'Save' buttons. A green circle with the number '3' is next to the 'Save' button.

MO ACTS Amazon Connect Reporting

MO ACTS now has standard reports to view metrics from the Amazon Connect Softphone and Contact Tracers calls. This includes reports such as average handle time for contacts, abandon rates, and agent performance. These reports are available to all users as view-only but can be utilized as a base report to create your own custom reports once saved to the Private Folder. Learn more about reporting by visiting our new MO ACTS Deep Dive Training Simulation or the Supervisor Guide on the MO ACTS Intranet Site.

Follow the steps below to learn how to utilize this new functionality.

1. Navigate to the **Reports Tab** then click **All Folders**
2. Click the folder titled **Amazon Connect Reports**

The screenshot shows the MO ACTS Reports interface. The 'Reports' tab is selected, and the 'All Folders' folder is highlighted. The 'Amazon Connect Reports' folder is visible in the list. The interface includes a search bar, a 'New Report' button, and a 'New Folder' button. The table below lists the folders and their details.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	Rajaguru Gurunathan	7/19/2020, 11:19 PM
Created by Me	Case Investigator Reports	Amit Mumbarkar	7/21/2020, 4:43 AM	Copado Integration	7/29/2020, 11:13 AM
Private Reports	Contact Tracer Reports	Amit Mumbarkar	7/21/2020, 4:43 AM	Copado Integration	7/27/2020, 4:58 AM
Public Reports	Dashboard Reports - Adoption	Dana Chamblee	7/10/2020, 9:10 AM	Dana Chamblee	7/10/2020, 9:10 AM
All Reports	Resource Coordinator Referrals	Amit Mumbarkar	7/21/2020, 4:43 AM	Amit Mumbarkar	7/21/2020, 4:43 AM
	Sales & Marketing Dashboards Reports	Dana Chamblee	7/10/2020, 9:10 AM	Dana Chamblee	7/10/2020, 9:10 AM
	Sales and Marketing Reports	Dana Chamblee	7/10/2020, 9:10 AM	Dana Chamblee	7/10/2020, 9:10 AM
	Service Dashboards Reports	Dana Chamblee	7/10/2020, 9:10 AM	Dana Chamblee	7/10/2020, 9:10 AM
	Supervisor Reports	Amit Mumbarkar	7/21/2020, 4:43 AM	Amit Mumbarkar	7/21/2020, 4:43 AM

3. From here, select the Amazon Connect report you want to open.

The screenshot shows the MO ACTS Reports interface with the 'Amazon Connect Reports' folder selected. The 'Average Handle Time' report is highlighted. The interface includes a search bar, a 'New Report' button, and a 'New Folder' button. The table below lists the reports and their details.

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Average Handle Time Today		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
Created by Me	Agent Performance (Current User)		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
Private Reports	Agent Answer Rate This Week		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
Public Reports	Agent All Interval 30 Today		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
All Reports	Average after contact work time	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
	Average customer hold time	AGENTS	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
	Average handled time	AGENTS	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
FOLDERS	Contact Handle Time	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
All Folders	Average Service Level 120 Seconds	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
Created by Me	Contacts Abandoned	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
Shared by Me	Average Occupancy Today		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
FAVORITES	Average Handle Time	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
	Average Queue Abandon Time	QUEUES	Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	
All Favorites	Contacts Agent Hung Up First This Week		Amazon Connect Reports	Rajaguru Gurunathan	7/19/2020, 11:19 PM	

- We suggest first looking at the default filters to evaluate if the report will display the data you want, then update the filters as desired.

NOTE: By modifying any of the Public Reports you will be modifying them for all users in MO ACTS. The best practice is to save the report as a personal report before modifying. View the current filters by clicking the Filter button. For example, for Average Handle Time you may want to update the **Start Interval** since it is set to today's date. You can change this filter to **All Time** in order to see a larger range of data, then select **Apply**.

- The report will now reflect the new filters.

AC Object Name	Start Interval	End Interval	Average handle time
ADAR_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	82
Subtotal			82
CLAP_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	-
Subtotal			0
GREENE_COQ (2)	11/5/2020, 12:00 AM	11/5/2020, 12:30 AM	68
Subtotal			82
JACKSON_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	-
Subtotal			0
JEFFERSON_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	-
Subtotal			0
NEWTON_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	-
Subtotal			0
STE_GENEVIEVE_COQ (1)	11/4/2020, 12:00 AM	11/4/2020, 1:00 AM	-
Subtotal			0
Total (8)			232

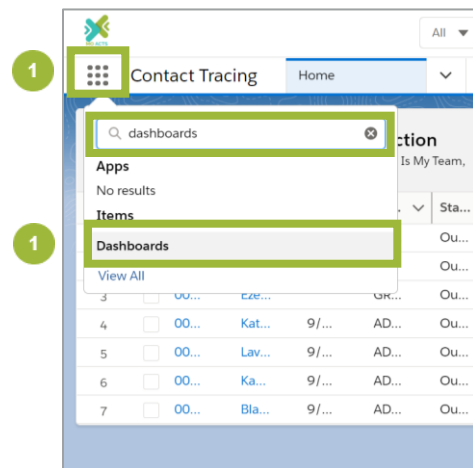
NOTE: Users will only be able to view data from their own jurisdiction. If you are a DHSS/Surge support user, you may have the ability to view data for multiple jurisdictions. To view only one jurisdiction, first save the public report as a personal report in the Private Folder. Then edit the report by clicking **Add Filter**, then select **AC Object Name**. Set the Operator field as Equals and the second field to the County you want to view.

MO ACTS Custom Dashboards

In addition to the pre-built dashboard functionality within MO ACTS, Contact Tracers can now create their own personal dashboards so that they can work with the selected reports side-by-side using them as components on a single page layout. By sourcing reports into a dashboard, Contact Tracers can customize how data is grouped, summarized, and displayed.

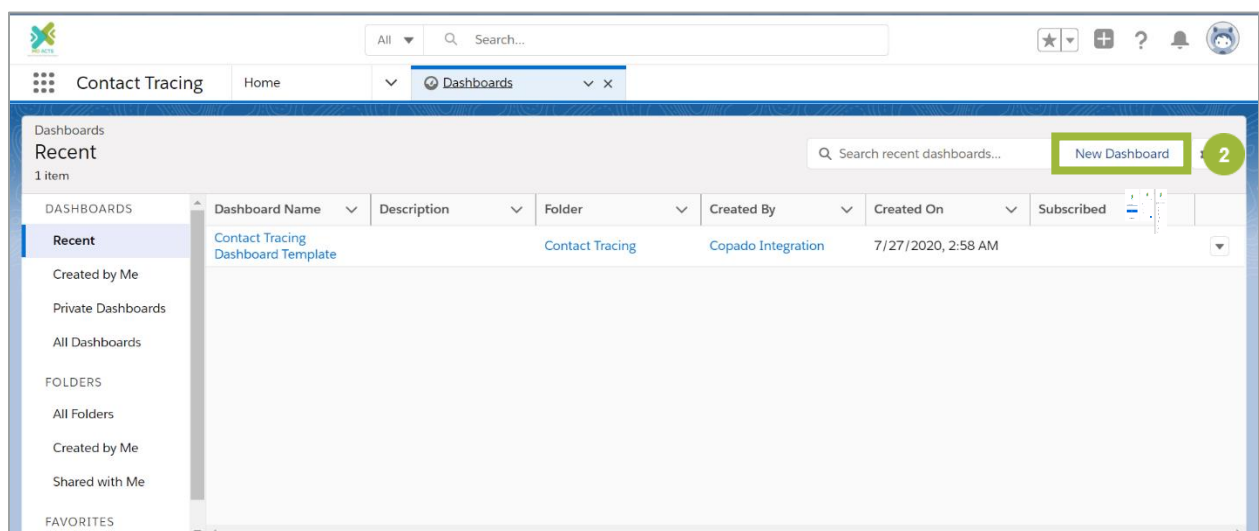
Below are the steps to customize dashboards.

1. From the home screen, use the waffle icon and search for Dashboards and then click it



2. Launch the dashboard builder by clicking **New Dashboard**.

NOTE: All Folders will show you all dashboards that have been created. Access to view each dashboard may vary.



3. Enter a name for your dashboard (e.g. "Custom Contact Tracing Dashboard"), add an optional description, select a folder to add it to, and click **Create**.

New Dashboard

* Name
Custom Contact Tracing Dashboard

Description

Folder
Private Dashboards

Select Folder

Cancel Create

4. Insert a component to your dashboard by clicking **+ Component**.

Contact Tracing Home Dashboards Custom Contact Tra...

Custom Contact Tracing Dashboard

+ Component

Save Done

5. There will be a pop up where you can add reports to the dashboard. Click the report you want to add and then click Select.

NOTE: When selecting a source report for use in a dashboard component, keep in mind that you can't choose joined reports or historical trend reports.

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Search Reports and Folders...

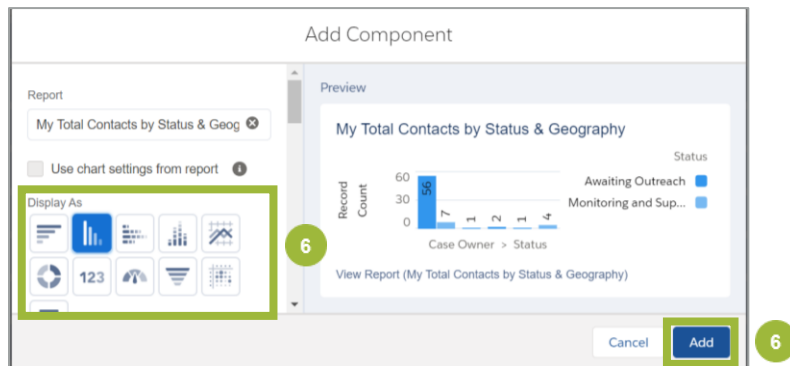
My Total Contacts by Status & Geography
Stefania Martitsch · Nov 5, 2020, 2:19 PM · Private Reports

30 Day Total Contact by Owner and Status
Copado Integration · Jul 27, 2020, 2:58 AM · Contact Tracer Reports

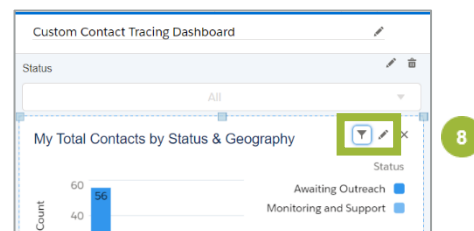
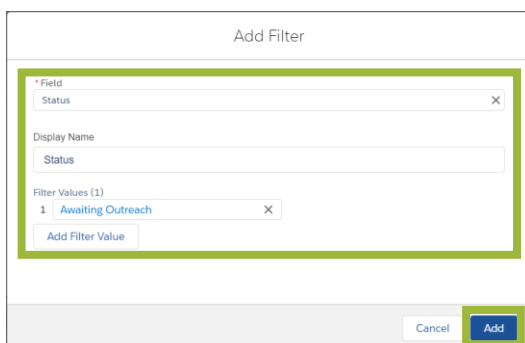
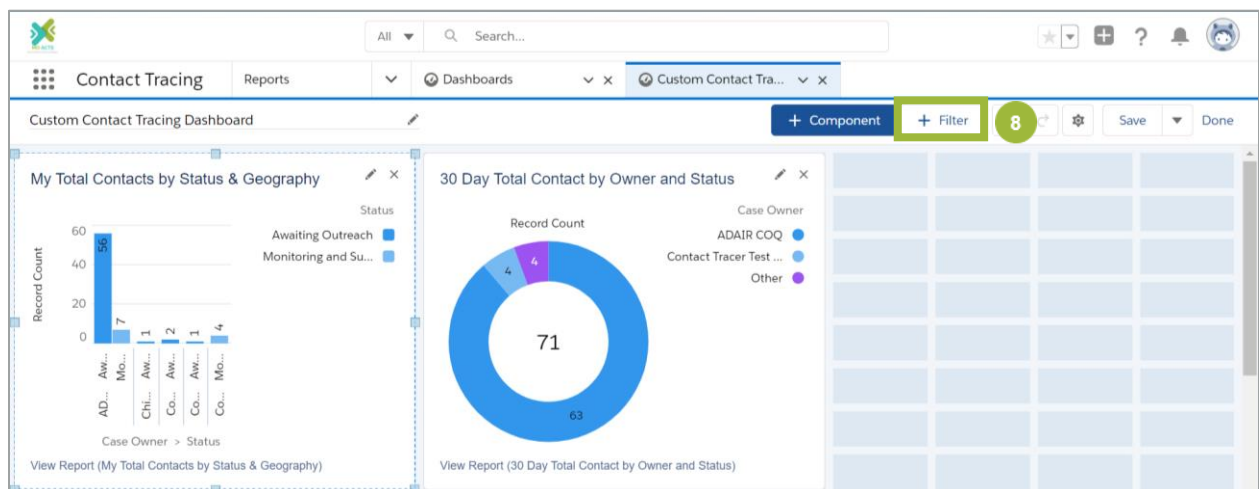
Total Contacts by Jurisdiction
Copado Integration · Jul 27, 2020, 2:58 AM · Contact Tracer Reports

Cancel Select

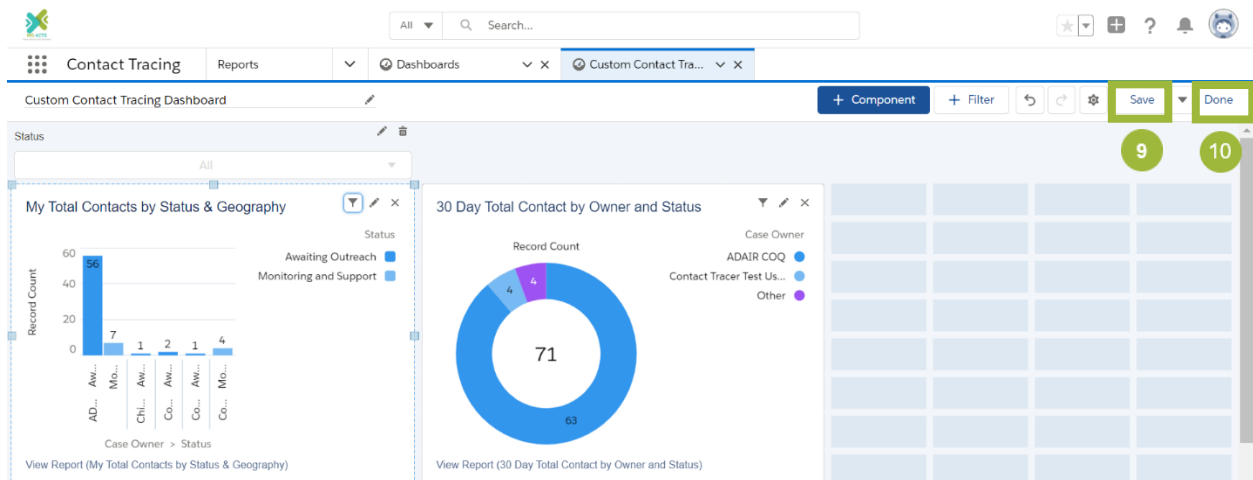
6. You will then have various options to visually display the report. Select chart type you'd like to use and preview on the right. Once it's set up how you like, click Add



7. Now the report is added to the dashboard. Repeat the steps to add more reports to build out the dashboard.
8. If you want to filter data, click **+ Filter**. Once you edited your filter, click **Add**. Now, you can sort the components in your dashboard.

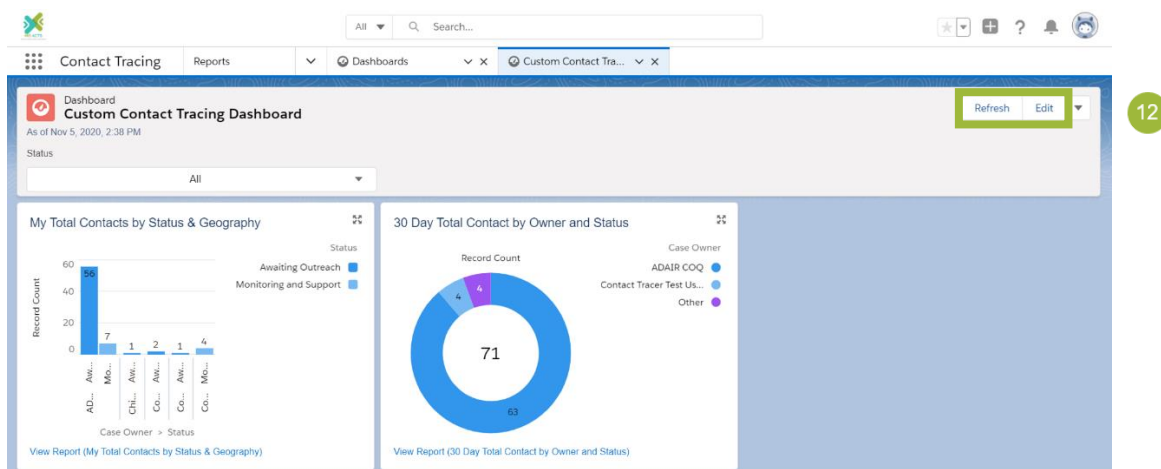
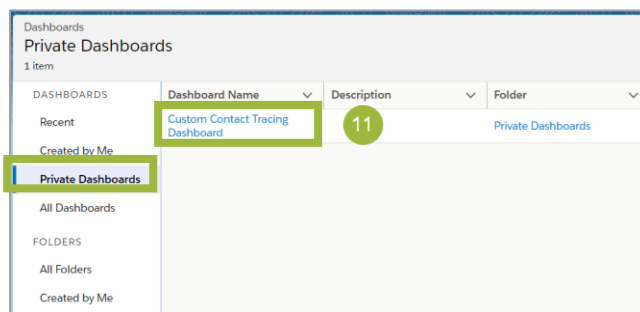


9. Click and drag components to rearrange them as you like. Click **Save**.
NOTE: you can also click **Save as** to save a copy of this dashboard to any location.
10. Click **Done**. Now your dashboard is ready.



11. You will always be able to return to your dashboard by visiting the folder it is in. Click the dashboard title to open it.
12. You can click **Refresh** for the most up to date version of the data while you have it open. You can **Edit** to make changes.

NOTE: You can also click Subscribe to receive emails at your chosen frequency and even share updates with colleagues if the dashboard is in a public folder.



MO ACTS Household Management

MO ACTS now has functionality to manage multiple contacts in a household. If the contact is a household member (e.g. resides in the same living space with other contacts) a contact tracer can streamline outreach by speaking with household members at once and updating their cases together versus individually calling each member.

In this section we will show you how to view if a contact is a part of a household and view additional details that can help inform your contact tracing activities.

Households are established in EpiTrax and the data flows over to MO ACTS using the Case CMR number to link together contacts within a household. Relationship to a case in EpiTrax will display as Contact Type in MO ACTS.

Contact Type helps group members of a household through their various roles. You will see the following attributes used:

- Adult Household (Default for Adults in Household)
- Child by case mother (Biological child)
- Child by other mother (Non-biological child)
- Household (Any person sharing the same household)
- Infant (Child under 1 year of age)
- Spouse Sexual Contact (External Sexual Contact to a Spouse/Adult in Household)

NOTE: Users will not have the ability to create a household in MO ACTS. It is best practice not to edit relationships within a household as this data is pre-determined in the case investigation process within EpiTrax and should be used solely to inform contact tracers about the contact's they will be tracking.



How to Review a Contact's Household Details

1. Review the contact details on the left-hand side of a case record to check if the contact is a member of a household. Additionally, check their contact type to learn their role in the household.

The screenshot displays the 'Contact Tracing' application interface. The top navigation bar includes 'Contact Tracing', 'Home', and a search bar. Below the navigation bar, the 'Actions & Recommendations' section is visible, with an 'Add' button and a message: 'You don't have any actions yet. Add an action to get started.' The 'Contact Details' section on the left lists personal information for Kayla A P, including home, mobile, and work phone numbers, email, and address. The 'casecmr1 Household' section at the bottom is highlighted with a green box and a red circle with the number 1. The right-hand side of the interface shows the 'Awaiting Outreach' status, case information, and a list of symptoms.

Contact Details

Name: Kayla A P
 Home Phone: (417) 800-0040
 Mobile: (417) 262-8900
 Work Phone: 1416005000
 Other Contact Name:
 Other Phone:
 Email: comuser19oct5@gmail.com
 Unit Number: Clyde Gallagher
 Mailing Address: test street 3300, Jackson, Missouri, United States
 Is Health Care Worker: ☐

casecmr1 Household

Joe A P
 Tammy A P

Case Information

Contact Type: Household
 Subject: Possible Contact: Oct 18th
 Date/Time Opened: 10/20/2020, 9:06 AM
 Outreach Underway Date:
 Outreach Outcome:
 Status: Awaiting Outreach
 Last Exposure Date: 10/18/2020
 Quarantine End Date: 11/1/2020
 Speaking with Household Member: ☐
 Employer Letter Requested?: ☐

Symptoms

Symptom Onset Date:
 Symptom Resolution Date:
 Abdominal Pain:
 Chest Pain:
 Chills:
 Cough:
 Diarrhea:
 Difficulty Breathing: ☐
 Fatigue:
 Fever:

To see additional details regarding a contact's household information, continue with these optional steps:

- Click into the household record to open a new tab, titled [CaseCMR] Household, and view all of the contacts associated with it.

The screenshot shows the CaseCMR interface. On the left, under 'Contact Details', there is a list of contacts. A green circle with the number 2 highlights the 'casecmr1 Household' tab. The main panel displays the 'Possible Contact: Oct 18th' form, which includes sections for 'Case Information' and 'Symptoms'. The 'Case Information' section contains fields for Contact Type (Household), Subject (Possible Contact: Oct 18th), Date/Time Opened (10/20/2020, 9:06 AM), Outbreak Underway Date, Outbreak Outcome, Status (Awaiting Outreach), Last Exposure Date (10/18/2020), Quarantine End Date (11/1/2020), Speaking with Household Member, and Employer Letter Requested. The 'Symptoms' section includes fields for Symptom Onset Date, Symptom Resolution Date, Abdominal Pain, Chest Pain, Cough, Diarrhea, Difficulty Breathing, Fatigue, Fever, Feverish, Headache, Loss of Smell and/or Taste, Muscle Aches & Pains, Nausea, Runny Nose, Shortness of Breath, Sore Throat, Vomiting, and Wheezing.

- The new tab will display. Click into any household member's name to display their Person Account.

The screenshot shows the CaseCMR interface. The top bar displays 'Contact Tracing' and 'Home'. The left sidebar shows 'casecmr1 Household' as the selected account. The main panel displays the 'casecmr1 Household' account details, including the Account Owner (Contact Tracer Test User3) and a list of 'Related Contacts (3)'. The 'Related Contacts' list includes Joe A P, Tammy A P, and Kayla A P. A green circle with the number 3 highlights the 'Kayla A P' contact. The 'Related Contacts' list also shows roles for each contact: Joe A P (Infant), Tammy A P (Household), and Kayla A P (Household).

- The Person Account details will display. Here you can see additional details about the contact, including if they are part of a secondary household.

Person Account: Kayla A P

Phone (4): (417) 262-8900 | Email: comuser19oct5@gmail.com | Account Owner: Contact Tracer Test User3

Details

Account Name	Kayla A P	Other Phone	
Unit Number	Clyde Gallagher	Mobile	(417) 262-8900
Mailing Address	test street 3300 Jackson, Missouri United States	Home Phone	(417) 800-0040
Birthdate	5/13/2019	Work Phone	(341) 600-5000
Age	1 Years	Email	comuser19oct5@gmail.com
Person is a Minor	<input type="checkbox"/>	Primary Household	casecmr1 Household
Occupation		Secondary Household	casecmr2 Household

Personal Details

If a contact is a member of a secondary household, this means that they are not only part of the primary household but are also part of a second household living with potentially more contacts to COVID-19 cases. These are based on EpiTrax Case CMR Numbers.

The primary household represents the first exposure event. The secondary household represents a secondary exposure event occurring after the first.

- Scroll down further on the Person Account Details page to see all cases this contact is associated with and all households they members of.

Cases (3)

Case	Contact Name	Date Opened	Status
00012689	Kayla A P	10/20/2020, 12:42 PM	Awaiting Outreach
00012687	Kayla A P	10/20/2020, 9:07 AM	Awaiting Outreach

[View All](#)

Person Account History (1)

Date	Field	User	Original Value	New Value
10/20/2020, 9:06 AM	Created	Joe Pleczynski		

[View All](#)

Related Accounts (2)

Account Name	Roles
casecmr1 Household	Household
casecmr2 Household	Household

[View All](#)

NOTE: If a contact tracer needs to re-assign ownership of a case to a county not in their jurisdiction, they will need to reassign ownership of each household contact case individually. It's important to keep in mind that once a household member is transferred outside of the contact tracer's jurisdiction, the contact tracer will no longer have permission to view that individual's case record or the household record of other members of the household remaining in the contact tracer's jurisdiction.

MO ACTS System UI Enhancements

In this section you'll learn about new user interface enhancements in MO ACTS.

MO ACTS Picklist Enhancements

Picklists have been updated to be more user friendly and easier to navigate throughout the guided call script and on the contact details page.

Multi-select Race Picklist

A new multi-select race picklist has been added to the contact details and guided script (in the Confirm Personal Details section) so that multiple races can be chosen as options when a contact tracer fills out case information from the contact. This field will initially populate with data from EpiTrax and can be edited.

When editing this field, you can now select from the **Available Race** list by holding down CTRL + clicking, then click the right arrow to add an option to the **Chosen Race** list.

Guided Script:

The screenshot shows a web form titled "Confirm Personal Details Continued". It contains several dropdown menus for "Are you of Hispanic Ethnicity", "Gender", and "Race". The "Race" dropdown is highlighted with a green border and is open, showing two columns: "Available Values" and "Selected Values". The "Available Values" list includes "American Indian or Alaska Native", "Asian", "Native Hawaiian or Other Pacific Is...", "Refused to Answer", and "UNKNOWN". The "Selected Values" list currently contains "Black or African American". Below the "Race" dropdown are checkboxes for "Are you a healthcare worker" and "Is this a household member of the original contact?". Further down are text input fields for "Occupation", "Other Occupation", and "Employer Name". At the bottom right, there are "Previous" and "Next" buttons.

State and Country Picklist

A new state and country picklist has been added to the guided script and the contact details. Previously a contact tracer would type the state or country, but now you are able to select from a drop down.

Contact Details:

Person Account
Zona Colla

Phone (4) (203) 938-2557 Email test@test.com Account Owner Contact Tracer Test User3

Details

* Account Name Salutation --None-- Other Phone 0087654321

First Name Zona

Middle Name Middle Name

* Last Name Colla

Suffix Suffix

Unit Number

Mailing Address

Mailing Country United States

Mailing Street 49440 Dearborn St

Mailing City Portageville Mailing State/Province Missouri

Mailing Zip/Postal Code 63873

Birthdate

Mobile 2039382557

Home Phone 2034611949

Work Phone 1234567890

Sign This field is not associated with your name Cancel Save test@test.com

Guided Script:

Confirm Personal Details

Before we start, let's make sure we have your correct contact information.

This information will be kept confidential according to the law and will not be available to the public.

Please verify your mailing address:

* Street 49440 Dearborn St

Unit Number

* City Portageville

State

Missouri

Iowa

Kansas

Kentucky

Louisiana

Maine


and you will no longer be able to access this record! Check the above box if you do not want to change the jurisdiction.

Previous Next

MO ACTS New Unit Field

A new field for Unit Number for the contact's address has been added to the contact details and the guided script to separate this address line detail.

Contact Details:


 Actions & Recommendations

Actions

History

Add

Guided Script - Contact Tracing

 Contact Details

Name

Zona Colla

Home Phone

(203) 461-1949

Mobile

(203) 938-2557

Work Phone

1234567890

Other Contact Name

Other Phone

(098) 765-4321

Email

test@test.com

Unit Number

403

Mailing Address

49440 Dearborn St
Portageville, Missouri 63873
United States

Is Health Care Worker

☐

Person ID

Birthdate

Age

Language

Person Is a Minor

☐


Next of Kin Name

Next of Kin Phone Number

Is In Congregate Setting

☐

Guided Script:

 Confirm Personal Details

Before we start, let's make sure we have your correct contact information.

This information will be kept confidential according to the law and will not be available to the public.

Please verify your mailing address:

* Street

49440 Dearborn St

Unit Number

403

* City

Portageville

State

Missouri

* Zip Code

63873

County

BOONE

☐ Do Not Change Jurisdiction ⓘ

WARNING:
Changing jurisdiction will change after you finish the call and you will no longer be able to access this record! Check the above box if you do not want to change the jurisdiction.

Previous

Next

MO ACTS Resource Coordination

In this section you will learn about new functionality around resource coordination in MO ACTS. After a contact tracer has conducted outreach to a Contact to a COVID-19 case and confirmed they require additional resources like food, support for chronic medical conditions, or specific household items during quarantine, the contact tracer will mark the contact to be referred to a resource coordinator. Now a resource coordinator can be assigned to the contact's case to begin follow-up. You will see how to view all contacts requiring resource coordination, assign a resource coordinator to a case, and then how to view cases assigned to you for resource coordination.

Resource coordinators will manage all records that need resource coordination for contacts during quarantine. They may be the same person who is doing contact tracing activities or they may be a different person, either way, the resource coordinator role has the same permissions in MO ACTS as a contact tracer.

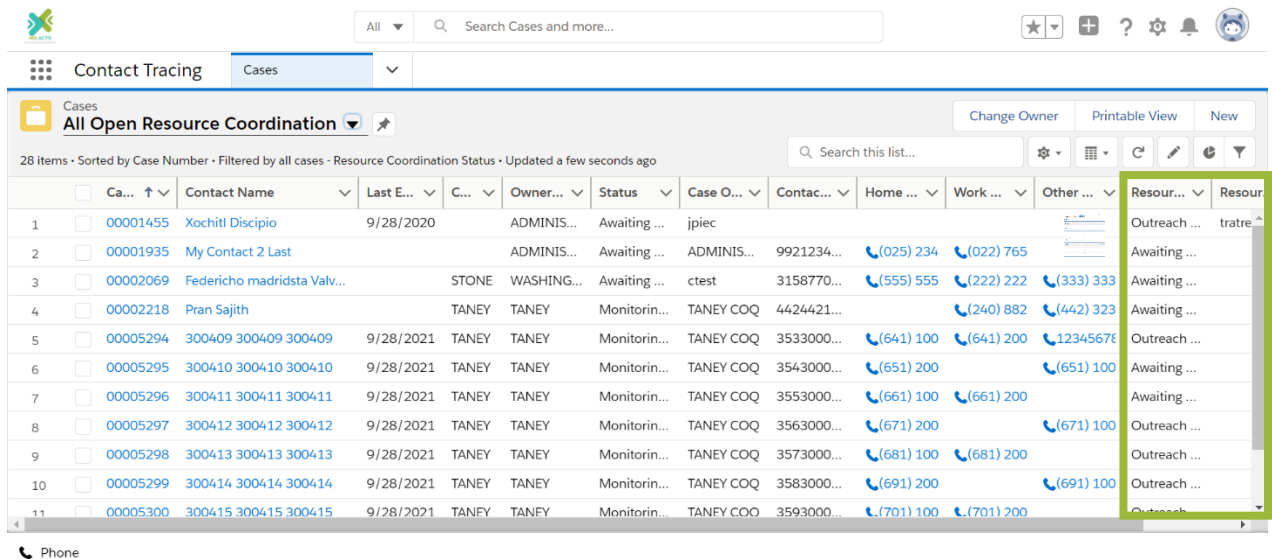
How to View All Contacts Requiring Resource Coordination

1. Navigate to the Cases Tab and use the drop down to select All Open Resource Coordination List View to view all of the contacts that require resource coordination.

The screenshot shows the MO ACTS interface. At the top, there is a navigation bar with a 'Cases' tab selected. A green box highlights the 'Cases' tab, and a green circle with the number '1' is next to it. Below the navigation bar, there is a search bar and a 'Recently Viewed' dropdown menu. The dropdown menu is open, showing a list of views. A green box highlights the 'All Open Resource Coordination' view, and a green circle with the number '1' is next to it. The main area of the interface displays a table of cases with columns for County, Status, Case Owner Alias, Epitrix Case CMR, and Case Record Num... The table contains several rows of data, including cases from BOONE, ADAIR, and MILLER counties.

County	Status	Case Owner Alias	Epitrix Case CMR	Case Record Num...
BOONE	Awaiting Outreach	BOONE COQ		
ADAIR	Awaiting Outreach	ADAIR COQ	casecmr1	444
ADAIR	Awaiting Outreach	ADAIR COQ		
	Awaiting Outreach	jplec		
BOONE	Awaiting Outreach	sstro		
RALLS	Awaiting Outreach	ctest	SR-CR7-03	
	Awaiting Outreach	jplec		
MILLER	Awaiting Outreach	MILLER COQ		
	Outreach Underway	ctrac		
WASHINGTON	Closed	ctest	SR-Cqqqq	
VERNON	Closed	ctest		
VERNON	Closed	ctest		

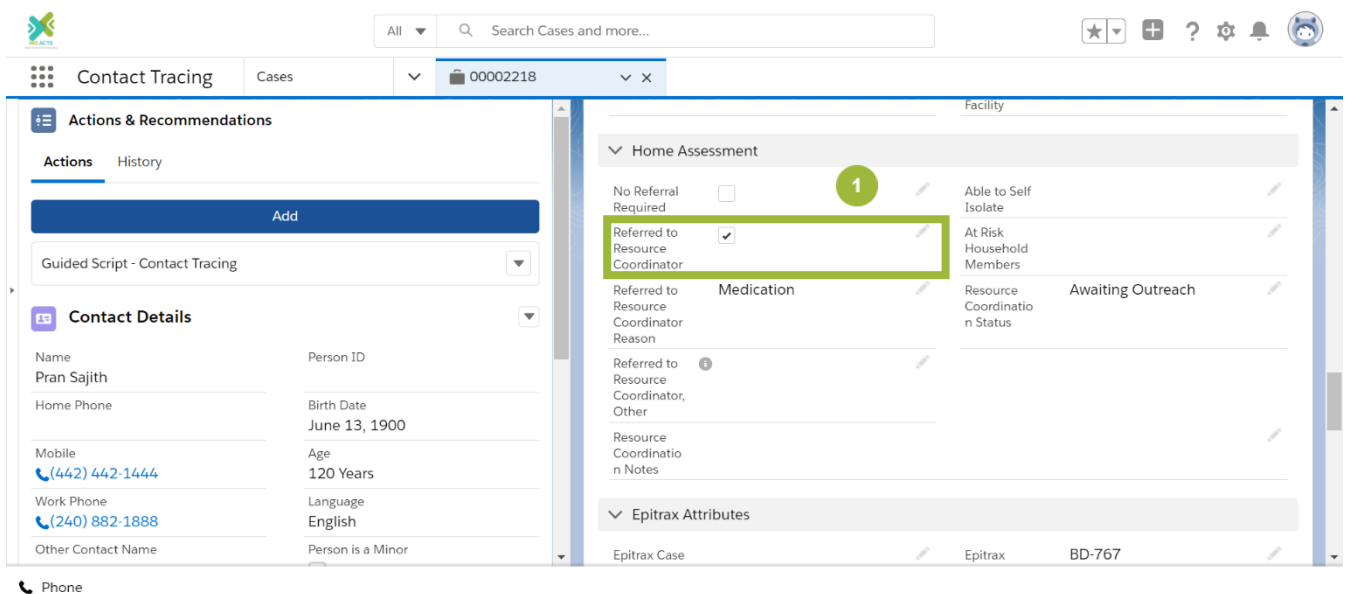
- The All Open Resource Coordination List View will display; please note that there are columns for resource coordination status and notes that can help you identify contacts requiring resource coordination. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.



Ca...	Contact Name	Last E...	C...	Owner...	Status	Case O...	Contac...	Home ...	Work ...	Other ...	Resour...	Resour
00001455	Xochitl Discipio	9/28/2020		ADMINIS...	Awaiting ...	jpiec					Outreach ...	trate
00001935	My Contact 2 Last			ADMINIS...	Awaiting ...	ADMINIS...	9921234...	(025) 234	(022) 765		Awaiting ...	
00002069	Federicho madridsta Valv...		STONE	WASHING...	Awaiting ...	ctest	3158770...	(555) 555	(222) 222	(333) 333	Awaiting ...	
00002218	Pran Sajith		TANEY	TANEY	Monitorin...	TANEY COQ	4424421...		(240) 882	(442) 323	Awaiting ...	
00005294	300409 300409 300409	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3533000...	(641) 100	(641) 200	12345678	Outreach ...	
00005295	300410 300410 300410	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3543000...	(651) 200		(651) 100	Awaiting ...	
00005296	300411 300411 300411	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3553000...	(661) 100	(661) 200		Awaiting ...	
00005297	300412 300412 300412	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3563000...	(671) 200		(671) 100	Outreach ...	
00005298	300413 300413 300413	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3573000...	(681) 200	(681) 200		Outreach ...	
00005299	300414 300414 300414	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3583000...	(691) 200		(691) 100	Outreach ...	
00005300	300415 300415 300415	9/28/2021	TANEY	TANEY	Monitorin...	TANEY COQ	3593000...	(701) 100	(701) 200		Outreach ...	

How to Assign a Resource Coordinator to a Case

- When you have opened a case, navigate to the Home Assessment section. You'll notice that the checkbox field 'Referred to Resource Coordinator' is already checked. A Contact Tracer will check this box during their outreach call with a contact to COVID-19 case if they require additional resources or support during quarantine.



Actions & Recommendations		Facility	
Actions History Add Guided Script - Contact Tracing		Home Assessment	
Contact Details Name: Pran Sajith Home Phone: (442) 442-1444 Mobile: (442) 442-1444 Work Phone: (240) 882-1888 Other Contact Name:		No Referral Required <input type="checkbox"/> Referred to Resource Coordinator <input checked="" type="checkbox"/> Referred to Resource Coordinator Reason: Medication Referred to Resource Coordinator, Other:	
Person ID: June 13, 1900 Birth Date: June 13, 1900 Age: 120 Years Language: English Person is a Minor:		Able to Self Isolate At Risk Household Members Resource Coordination Status: Awaiting Outreach	
		Epitrax Attributes Epitrax Case: BD-767	

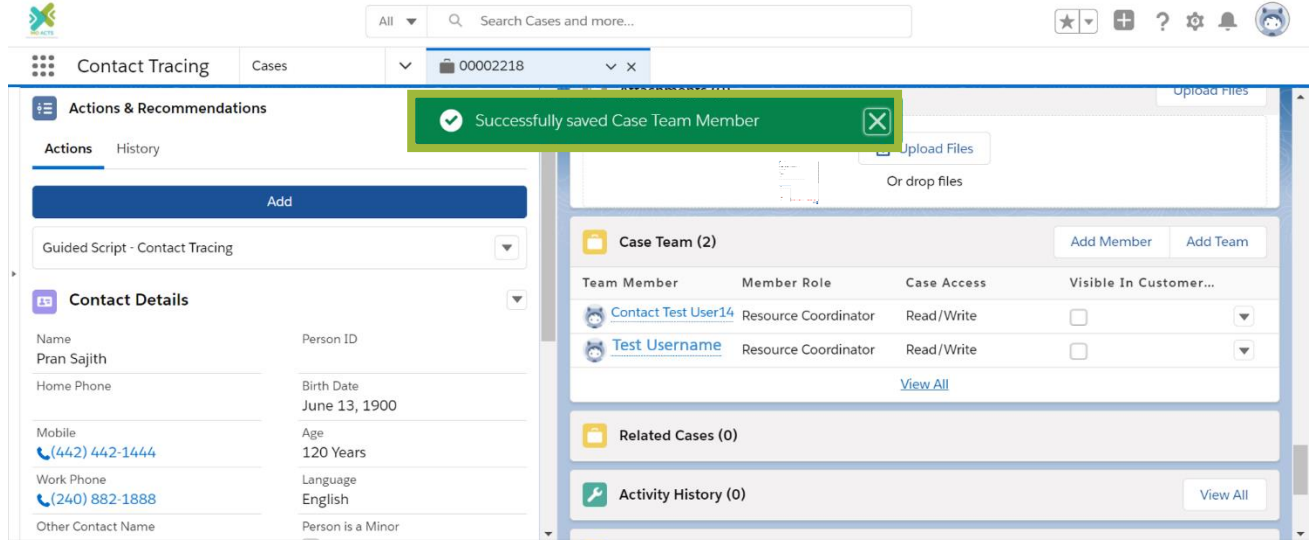
2. To assign yourself or someone else as a Resource Coordinator scroll to the Case Team Section and select Add Member.

The screenshot shows the MO ACTS interface for a case. The 'Case Team' section is visible, showing a table with columns: Team Member, Member Role, Case Access, and Visible In Customer... The table contains one entry: 'Contact Test User14' with the role 'Resource Coordinator' and 'Read/Write' access. The 'Add Member' button is highlighted with a green box. Other sections visible include 'Actions & Recommendations', 'Contact Details', and 'Attachments (0)'.

3. Type in the name of the resource coordinator you would like to own the case and then select that individual. Ensure you search using People to assign a MO ACTS user to the case; do NOT set a Contact to a COVID-19 Case as a team member.
4. Click **Save**

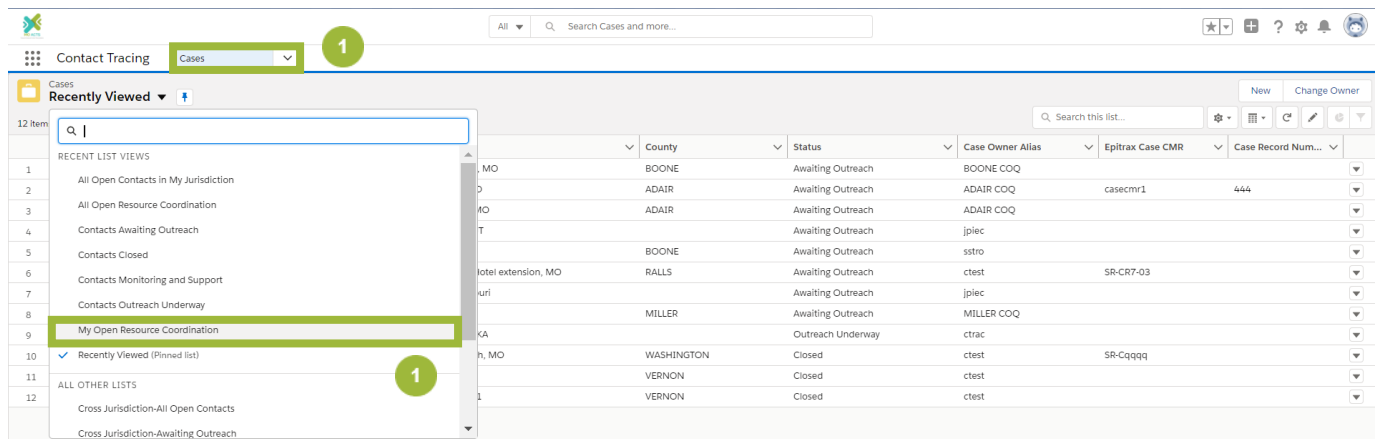
The screenshot shows the MO ACTS interface with a 'Search for and add member' dialog box open. The dialog box has a search bar with 'Test Username' entered and a dropdown menu showing 'Resource Coordinator'. The 'Save' button is highlighted with a green box. The background shows the same case details as the previous screenshot.

5. A notification will appear saying you have successfully added a case team member.



How to View All Cases Assigned to Yourself as a Resource Coordinator

1. Navigate to the My Resource Coordination list view using the drop down. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.



- The My Open Resource Coordination queue will display. As the resource coordinator continues to work with the Contact to COVID-19 case they can progress the case's resources status as needed.

The screenshot shows a web application interface for 'My Open Resource Coordination'. At the top, there's a search bar and navigation tabs for 'Contact Tracing' and 'Cases'. The 'Cases' tab is active, showing a table of cases. The table has columns: Case Number, Contact Name, Last Event, Case Owner, Status, Case Outcome, and various phone numbers. The table is filtered by 'My case teams - Resource Coordination Status' and shows 6 items. The cases are sorted by Case Number.

Case Number	Contact Name	Last Event	Case Owner	Status	Case Outcome	Phone Numbers
00002069	Federicho madridista Valv...		RALLS	WASHING...	Awaiting ...	ctest
00009045	Julian Test Laprade	9/8/2020	AUD...	AUDRAIN	Awaiting ...	ctest, 9921234..., (025) 234, (022) 765
00009268	Rosina Test Arellanes	9/1/2020	TEXAS	ADMINIS...	Awaiting ...	ctest, 3158770..., (555) 555, (222) 222, (333) 333
00009279	Zana Test Druck	8/28/2020	AUD...	AUDRAIN	Awaiting ...	ctest, 4424421..., (240) 882, (442) 323
00009577	Virgilio Test Luckenbach	8/31/2020	AUD...	AUDRAIN	Awaiting ...	ctest, 3533000..., (641) 100, (641) 200, 12345678
00010996	Arun Mano Varghese	10/12/2...	TANEY	TANEY	Closed	ctest, 3543000..., (651) 200, (651) 100

NOTE: Updating the status for resource coordination will not change the Contact to Covid-19 case status but rather will be a way for a resource coordinator to keep track of their work.

MO ACTS Amazon Connect Updates

In this section you will learn about additional features and functionality that have been added to the Amazon Connect phone system within MO ACTS.

No Outbound Calls Outside of the US

MO ACTS users are now restricted from calling anywhere outside of the United States, Puerto Rico, and the US Virgin Islands.

Call Duration is Captured

During the contact outreach process, MO ACTS automatically creates a task for every outbound call after the call is disconnected. Now, when a contact tracer ends a call, the duration of the call will be automatically logged. This metric can be useful to report information regarding calls using the reporting functionality in MO ACTS. To learn more about reporting, visit the [Supervisor Guide](#).

The screenshot displays the MO ACTS interface for a 'Phone Call' record. The 'Details' tab is active, showing fields for Call Direction (OutBound), Call Intention, Call Outcome, Due Date/Time, Phone ((203) 461-1949), and Comments. Below this, the 'Related To' section shows the call is related to case 00001467, named 'Zona Colla'. The 'Task Information' section shows the subject is 'Call', assigned to 'Sharon Strong', with a status of 'In Progress'. The 'Call Duration' field is highlighted with a green box and contains the value '73'. The 'System Information' section shows the call was created and last modified by Sharon Strong on 10/22/2020 at 5:53 PM.

Phone Call	
Call Direction	OutBound
Call Intention	
Call Outcome	
Due Date/Time	
Phone	(203) 461-1949
Comments	

Related To	
Related To	00001467
Name	Zona Colla

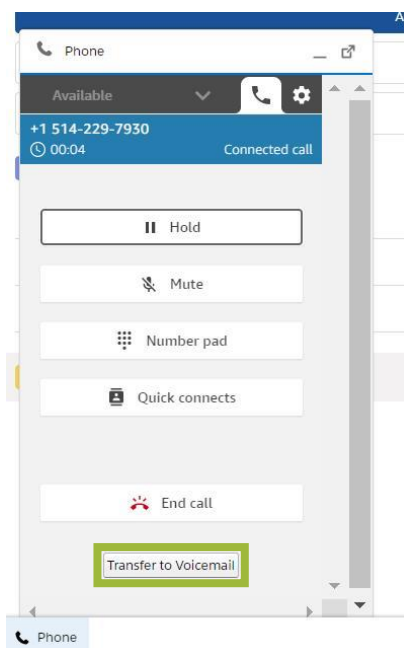
Task Information	
Subject	Call
Assigned To	Sharon Strong
Status	In Progress
Call Duration	73
Due Date	
Priority	Normal

System Information	
Created By	Sharon Strong, 10/22/2020, 5:53 PM
Last Modified By	Sharon Strong, 10/22/2020, 5:53 PM

Leave an Automated Voicemail

During the contact outreach process, contact tracers can leave a pre-recorded voicemail for the Contact to COVID-19 case. The Amazon Connect Softphone features a new “Transfer to Voicemail” button, as shown below. When you reach the contact’s voicemail, click this button to leave the pre-recorded voicemail. Please note that the automated voicemail message is only in English.

The complete voicemail message is as follows: Hello, I am calling from Department of Health for State of Missouri working with the Contact Tracing Collaborative. We are following up with you and will call you back soon. You are also welcome to call us back on +1 (573)7511656.



Differentiating Missed Calls with and without Voicemails

In order to differentiate Missed Calls with and without voicemails, MO ACTS will automatically set the subject of missed call tasks to clearly state if a voicemail was left by the caller or not. A contact tracer can navigate to the Tasks Tab and view any list view to see missed call tasks listed.

If a voicemail was left, the call task subject will be set to "Call: Voicemail." If there is no voicemail, the call task subject will be set to "Call: No Answer, No Voicemail."

	Subject ↑	Create Date	Due Date	Assigned To
1	Call: Voicemail	10/21/2020, 8:55 AM		Sharon Strong
2	Call: Voicemail	10/21/2020, 8:56 AM		Sharon Strong
3	Call: No Answer, No Voicemail	10/22/2020, 2:40 PM		Sharon Strong
4	Call: No Answer, No Voicemail	9/14/2020, 4:12 PM	9/15/2020	Sharon Strong

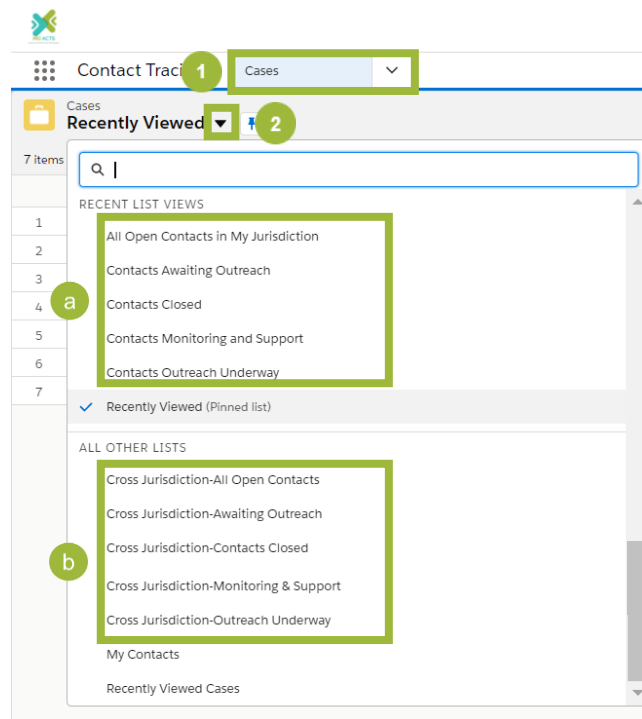
MO ACTS Jurisdictional Ad-Hoc Access

In this section, you will learn how users from jurisdictions with data sharing agreements will now have the ability to see multiple jurisdiction groups and see Contact to COVID-19 case records for each jurisdiction group in which they are assigned.

Contact Tracers will be able to view their primary jurisdiction in a list view as well as view additional secondary jurisdictions they're assigned to in separate list views.

To navigate to the various list views, follow these steps:

1. From the **Home screen**, navigate to the **Cases tab**
2. Click the drop-down arrow. You will now see List View options. This is where you will be able to view your Primary and Cross jurisdiction lists views
 - a. Your **Primary Jurisdiction** list view will show you all open contacts in your Primary jurisdiction lists include:
 - i. All Open Contacts in My Jurisdiction
 - ii. Contacts Awaiting Outreach
 - iii. Contacts Outreach Underway
 - iv. Contacts Monitoring and Support
 - v. Contacts Closed
 - b. List views that start with **Cross Jurisdiction** will show you all open contacts in **all** of the jurisdictions in which you're assigned, Primary and Secondary.



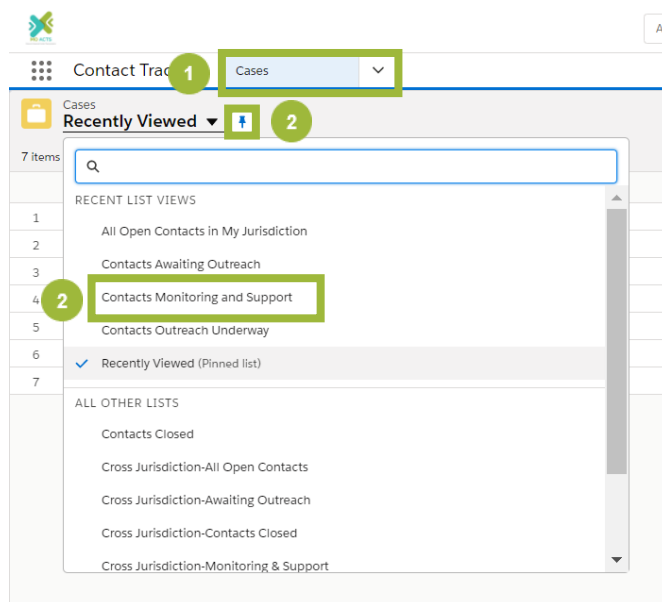
MO ACTS Bulk Contact Case Actions

Closing Cases in Bulk

Contact Tracers now have the ability to close cases in bulk. This new functionality allows for you to close up to 200 cases at a time.

Below are the steps to close a case in bulk.

1. From the home screen, navigate to the **Cases tab**.
2. From the cases tab, click the drop-down arrow and select an appropriate queue (e.g. Monitoring and Support).



3. Now, you will see all the cases you own that are in the monitoring phase. Select the cases you wish to close by clicking to the left of the case number in the checkbox.

	Case Num...	Contact Name	Last Exposur...	County	Status	Clos...	Clos...
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHINGTON	Monitoring and Support		
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Monitoring and Support		
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Monitoring and Support		
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support		
5	<input type="checkbox"/> 00001898				Monitoring and Support		
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support		

- Next, under **Status** update a case to **Closed** from the dropdown, then click the checkbox for **Update selected items** to mass update every selected case status to 'Closed.'
- Click **Apply**.

	Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support		
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed		
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR			
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR			
5	<input type="checkbox"/> 00001898						
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support		

- Lastly, choose the **Closed Reason**. Contact Tracers have the option to choose individual Closed Reasons or, similar to Step 4, you can select the checkbox to mass update the selected items with the same Closed Reason. Click **Apply**.

	Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	Case Owner A...	Conti
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			ctest	(518)
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed				52
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Closed				12
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support				352
5	<input type="checkbox"/> 00001898				Monitoring and Support				
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			smart	3158
7	<input type="checkbox"/> 00001993	Roberto Carlos	9/23/2020	CALDW...	Monitoring and Support			smart	3158

- Once all your changes are complete, click **Save**. Now, all the cases you just closed will be in the **Contacts Closed List View**.

	Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	Ca:
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			cte
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed			sm
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Closed			AD
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support			ctr
5	<input type="checkbox"/> 00001898				Monitoring and Support			KAI
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			sm
7	<input type="checkbox"/> 00001993	Roberto Carlos	9/23/2020	CALDW...	Monitoring and Support			sm
8	<input type="checkbox"/> 00002086	Carlos Puyol		WASHIN...	Monitoring and Support			cte
9	<input type="checkbox"/> 00002098	Geo M George	9/28/2020	TANEY	Monitoring and Support			cte
10	<input type="checkbox"/> 00002105	Roronoa Zero		ADAIR	Monitoring and Support			cte

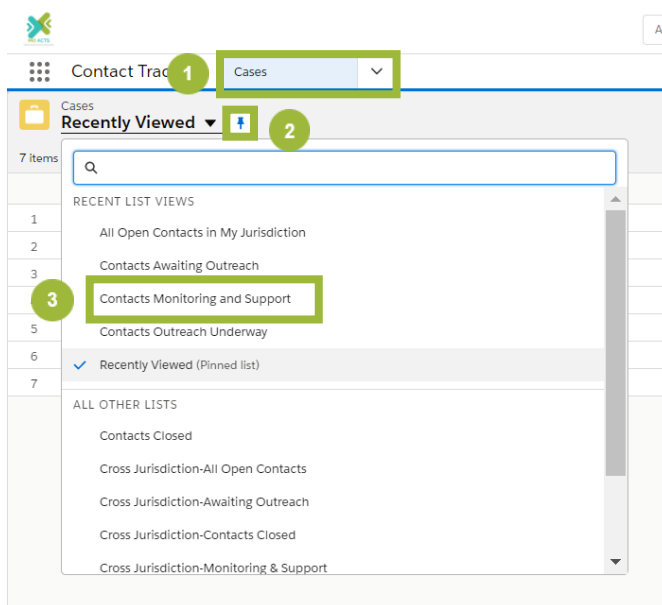
Reassigning Cases in Bulk

Contact Tracers can now mass reassign Contact to COVID-19 cases. This will allow a contact tracer to reassign their contact cases to someone else, a supervisor to assign contact cases to individual contact tracers, or a contact tracer to reassign contact cases to a different jurisdiction's queue. This functionality allows you to reassign up to 200 cases at a time.

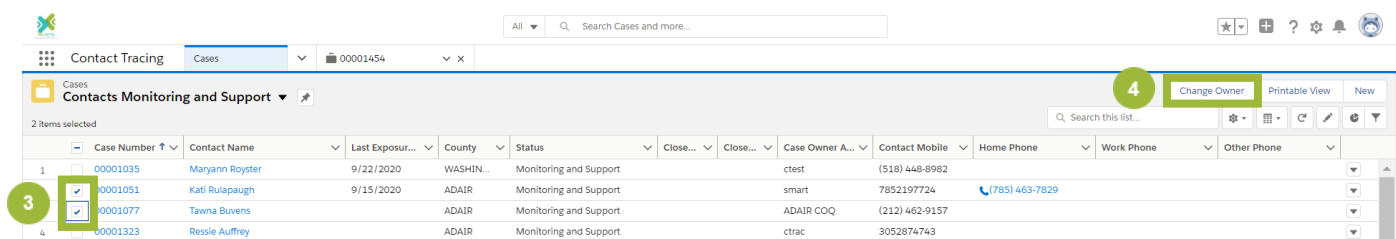
NOTE: If a user is actively in the Contact to COVID-19 Case record making updates and their case is reassigned before they save their changes, they will no longer have access to the case and they will get an error message when they try to save their changes.

Below are the steps to reassign a case in bulk.

1. From the home screen, navigate to the **Cases tab**.
2. From the **Cases tab**, click the drop-down arrow and select an appropriate list view (e.g. Monitoring and Support).

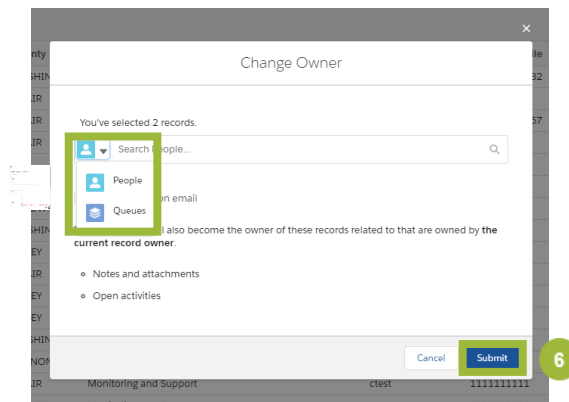


3. Once the list view opens, select the cases you wish to reassign by clicking to the left of the case number in the checkbox.
4. Click the **Change Owner** button.



5. You can now either choose to select a **Queue (jurisdiction)** or a **Person** to reassign the case to.

6. Click **Submit**.



MO ACTS Case, Contact, and Account Page Layouts

On the **Case Record**, **Contact Record**, and **Account Record**, the page layouts have been reordered for clarity so that the fields read more intuitively.

After analysis, it was found that the Congregate Setting fields were the least used and thus were removed from the **Case Page** layout. However, this setting can still be found on the left-hand pane checkbox field, **Congregate Setting**.

For your awareness, the CDC identifies a congregate setting as “shared housing [that] includes a broad range of settings, such as apartments, condominiums, student or faculty housing, national and state park staff housing, transitional housing, and domestic violence and abuse shelters. People living and working in this type of housing may have challenges with social distancing to prevent the spread of COVID-19.”

Additionally, in the Monitoring section where Contact Tracers can see related cases to the contact, the fields have been re-ordered for clarity as well.

MO ACTS Route to Queue based on the EpiTrax Investigating Agency

Typically, Contact to COVID-19 cases are routed to MO ACTS based on the county field in EpiTrax. Going forward, if there is no county populated in EpiTrax, the contact case will route based on the investigating agency of the original positive or probable COVID-19 case in order to assign the contact to the appropriate jurisdictions queue.

Routing logic for this functionality assumes that the investigating agency will never be null. Additionally, multiple agencies can map to one queue/county. If the queue/jurisdiction does not have any MO ACTS users (e.g. the jurisdiction has not yet started using MO ACTS), the ownership of the contact will be routed to an Administration queue (DHSS surge support).

MO ACTS Additional EpiTrax Attributes

Contact Tracers can now see additional EpiTrax attributes within MO ACTS, including the Contact Record Number and the Case Record Number. These will allow Contact Tracers who are also Case Investigators to search using these identifiers in EpiTrax. For example, if a Contact to a COVID-19 case developed symptoms, they can be searched for in EpiTrax using the Contact Record Number and case investigation can begin.

▼ EpiTrax Attributes	
EpiTrax Contact CMR ⓘ	Person ID ⓘ
Contact Record Number ⓘ	

Key Terms:

EpiTrax Contact CMR: This field is what links together EpiTrax and MO ACTS cases. For EpiTrax users, this is the identifier (record number) for the morbidity event (CMR numbers are auto generated IDs in EpiTrax).

Contact Record Number: This is the field that MO ACTS users can use to search back within EpiTrax to track information about the EpiTrax case or event.

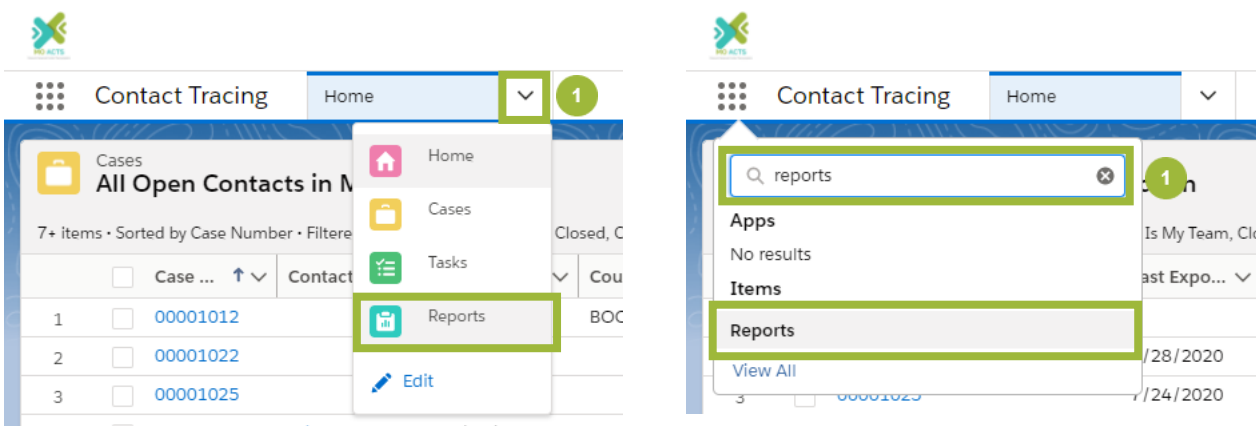
Person ID: This is an individually assigned identifier in EpiTrax for the contact.

MO ACTS Reporting: Export Data as an LPHA User

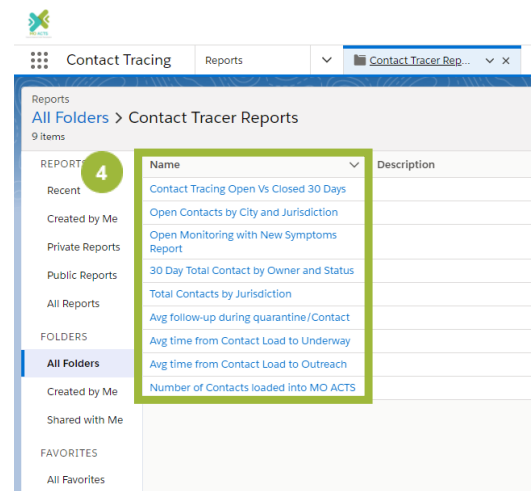
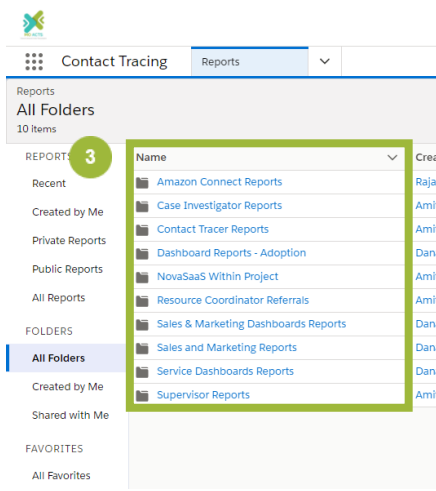
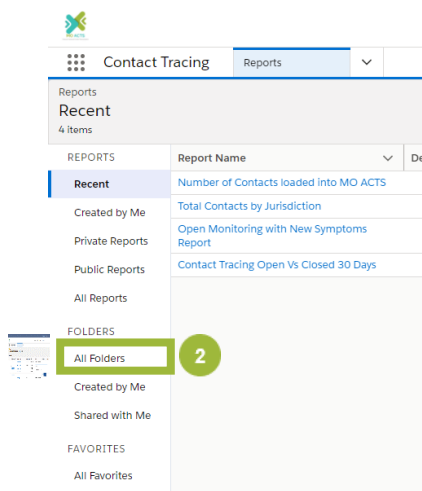
In addition to established reporting functionality within MO ACTS, Contact Tracers can now export data so that they can work with the selected reports outside of the MO ACTS platform.

Below are the steps to access reports and export data.

1. First, there are two ways to navigate to the **Reports** tab. From the Home screen, you can either click into the drop down where you can add Reports as quick link if it is not displayed, or you can use the waffle icon and search for reports from there. Click **Reports**.



2. Once in **Reports**, click **All Folders** to view the various folders of each report.
3. Next, select the folder containing the report. The **Contact Tracer Reports** folder has standard reports available to view and export.
4. Then, select the report you want to view.



5. Once the report is open, click export from the dropdown.

The screenshot shows the Salesforce interface with the 'Open Contacts by City and Jurisdiction' report open. The report title is 'Open Contacts by City and Jurisdiction'. Below the title, it says 'Total Records: 7,877'. A table with columns 'County', 'Status', 'Case Number', 'Account Name', and 'Date/Time Opened' is visible. The 'Export' button is highlighted in the top right corner of the report area.

6. You will be presented with two options for the **Export View**. The **Formatted Report** will export the file as it appears in MO ACTS and the **Details Only Report** exports the detailed rows. You will want to choose **Details Only** if you plan to manipulate the data once exported or upload it to other systems. Then select **Format** (xls or csv) and **Encoding**.

The screenshot shows the 'Export' dialog box. It has two tabs: 'Formatted Report' and 'Details Only'. The 'Details Only' tab is selected. Below the tabs, there are two dropdown menus: 'Format' (set to 'Excel Format .xls') and 'Encoding' (set to 'ISO-8859-1 (General US & Western Europ)'). There are 'Cancel' and 'Export' buttons at the bottom.

7. Now, the report will download in your internet browser. Click the file and it will open.

The screenshot shows the Salesforce interface with the 'Open Contacts by City and Jurisdiction' report open. The report title is 'Open Contacts by City and Jurisdiction'. Below the title, it says 'Total Records: 7,877'. A table with columns 'County', 'Status', 'Case Number', 'Account Name', and 'Date/Time Opened' is visible. At the bottom of the report, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'. A file download notification is visible at the bottom left, showing a file named 'report16016588514...xls'.